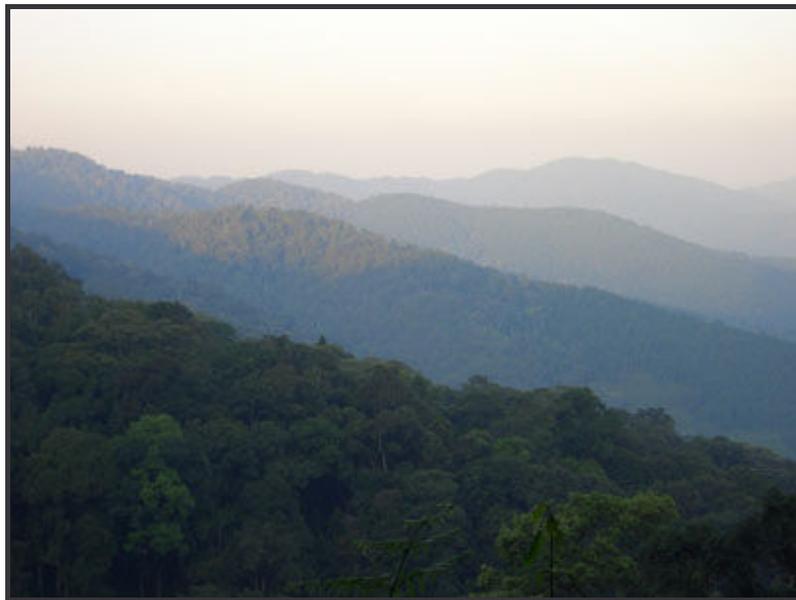

Tourism Development Strategy for Nyungwe National Park, Rwanda



Tourism Development Strategy for Nyungwe National Park, Rwanda

Proposals for the short to medium term sustainable
development of tourism in southwest Rwanda.

March 2004



Compiled by Matt Walpole
Produced on behalf of ORTPN
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Co-ordinated by WCS

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EXECUTIVE SUMMARY (ENGLISH)

Tourism is viewed as a major part of Rwanda's national development strategy, and ecotourism based on national parks and wildlife is anticipated to contribute significantly to industry growth and foreign exchange earnings. The principal international attraction remains the mountain gorillas of Volcanoes National Park, but in an effort to diversify the product, attention has focused on other protected areas, including Nyungwe forest.

Nyungwe National Park in the south west of Rwanda, is a 970 km² area of Montane tropical forest, accommodating some 13 primate species, including chimpanzees, and numerous avian and botanical endemics. It is managed by ORTPN with assistance from WCS, which initiated primate-viewing tourism in Nyungwe in the late 1980s. It has clear potential as a second destination within Rwanda to complement the mountain gorillas and form the basis of a 'primate discovery tour' that would serve to retain international visitors for a longer period of time within Rwanda.

Tourism development in Nyungwe is currently rudimentary, and visitation levels are low. In an effort to stimulate the process of development, this strategic plan was commissioned. It is the result of a participatory consultation exercise with international, national and local stakeholders from government, NGO, public and private sectors. This document reviews the current situation regarding Nyungwe tourism, and makes a series of recommendations for future development, prioritised over a five-year time frame, within a strategic framework that defines and upholds a long-term vision of sustainable tourism development for the forest.

A defining element of this strategic plan is the necessity to balance growth and foreign exchange earnings at the national level with conservation and rural development priorities at a local level. A series of underlying principles, that ensure that this balance is maintained, have been incorporated into the strategy. The most important operational elements, however, are a series of action points and specific action plans that outline the practical detail that should be implemented to achieve success. These are based around identification of target market segments and their requirements, targeted primary and complementary product development, and supporting operational aspects that will enhance capacity and efficiency.

Consultation suggests that international image, security concerns, a lack of adequate infrastructure, and a lack of private investment to facilitate this, all limit the potential for growth in high-end eco-travel markets. Most importantly, there is as yet no guaranteed quality product to offer this market segment until chimpanzees and other primates are adequately habituated in accessible and restricted ranges. Thus, growth in this sector must be perceived as a medium to long-term objective in the context of this strategic plan.

More immediately, existing market segments (lower to mid-range independent travellers and residents), that require lower levels of luxury and investment, and that have greater potential for linkages with local economies, should not be ignored. Their interests could be most effectively met by upgrading existing facilities and replacing current 'unofficial' accommodation with an equivalent, small-scale, mid-range development on the western side of the forest.

A hitherto untapped segment is the domestic Rwandan market that has a range of advantages once established. This could be developed and exploited most effectively by offering accommodation, interpretation and developed educational trail networks on the more accessible eastern side of the forest, focused on the Kitabi complex that is soon to be redeveloped as a park headquarters.

Thus, three specific segments should be targeted. Primary product for international visitors should focus on guaranteed primate viewing, and in this regard development of the Cyamudongo community forest to the west of Nyungwe offers much potential. The western

side of the forest is more pristine and picturesque, and existing trails in the Uwinka area, to the Kamiranzovu swamp, and to the waterfall that exits the swamp should all be maintained and enhanced. Additional complementary product should focus on the tea plantations surrounding the forest, that form a natural site for accommodation and plantation tours, and on nearby Lake Kivu, that offers recreational activities and a transport route north to the gorillas. Less accessible attractions such as the source of the Nile and the southern bamboo forest with owl-faced monkeys offer alternatives for special-interest groups that could also be developed over time.

The development of facilities and attractions on the edge or outside of the forest offer additional potential for community involvement and benefit. This is most likely to be maximised through employment and the support of co-operatives to supply natural produce (including honey and tea) and handicrafts to visitors. The provision of a handicrafts workshop at Kitabi, and retail outlet(s) to the west of the forest, will enhance local economic linkages with tourism. An additional opportunity may be exploited through provision of community-run campsites or hostels, although these require careful planning and partnership support, as well as a secure market.

The recommendations for development within this document require further validation through market research that will take place as a follow-on exercise from April to June 2004. It is equally important that the strategy is implemented as a collaborative initiative between ORTPN and other stakeholders that can offer advice, expertise, vision and resources. In that regard, a steering committee to oversee the implementation of the strategy is proposed. The development of enhanced human and institutional capacity is a critical element for success, alongside comprehensive monitoring and co-ordination. These and other operational priorities are built in to a set of strategic objectives. If these objectives are met, then significant progress will be made towards achieving the overall vision for tourism development in Nyungwe.

EXECUTIVE SUMMARY (FRENCH)

STATEMENT BY THE DIRECTOR OF TOURISM (MINICOM)

STATEMENT BY THE DIRECTOR GENERAL, ORTPN

ACRONYMS

DFID	Department for International Development (UK)
DRC	Democratic Republic of Congo
GDP	Gross Domestic Product
GoR	Government of Rwanda
GTZ	German Technical Assistance Organisation
MIG	Gikongoro Multisector Investment
MINICOM	Ministry of Commerce, Industry, Investment Promotion, Tourism and Cooperatives
NGO	Non-Governmental Organisation
ORTPN	Office Rwandais du Tourism et des Parc Nationaux
OTF	On The Frontier
PASUD	Projet de Developpement Artisanal au Sud du Rwanda
PCFN	Projet Conservation de la Forêt de Nyungwe
PNA	Parc National Akagera
PNV	Parc National Volcanoes
SARS	Severe Acute Respiratory Syndrome
SWOT	Strengths, Weaknesses, Opportunities, Threats
UN	United Nations
UNDP	United Nations Development Program
US	United States
WCS	Wildlife Conservation Society
WTO	World Tourism Organisation

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1. INTRODUCTION

Tourism and development in Rwanda

Prior to the war and genocide of the early 1990's, international tourism was the third most important contributor to GDP in Rwanda. It was, and still is, based heavily around the mountain gorillas of the Park National des Volcans (PNV). This intensely charismatic species is restricted to Rwanda, Uganda and the Democratic Republic of Congo (DRC), and Rwanda is both the original and best destination to view these animals. Since the mid-1990s, international tourism in Rwanda has begun to recover. However, its recovery is constrained by its over-reliance on gorilla viewing, which is currently limited by permit to 32 visitors per day (11,680 per year), who only stay for a very limited amount of time in the country.

Within Rwanda's '2020 Vision' for national development and poverty alleviation, international tourism is considered one of the major sectors with the potential for significant growth. A significant proportion of that growth is expected in the 'eco-traveller', or high-end nature-based market, through increased visitor volume, daily expenditure and length of stay. Given the constraints on such growth of the single attraction of gorilla viewing, the national vision for tourism development has identified additional natural attractions that should be developed for tourism. Foremost among these is Nyungwe National Park.

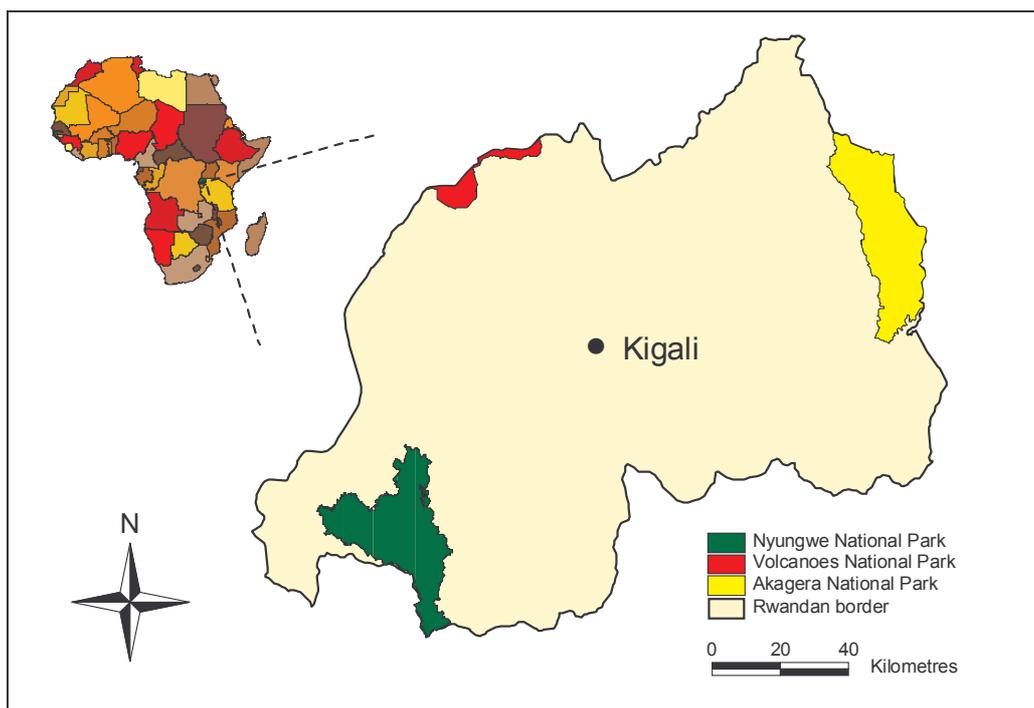


Fig 1. Location of Nyungwe National Park in Rwanda.

Profile of Nyungwe National Park

Location and biophysical environment

Nyungwe National Park (hereafter referred to as Nyungwe) is located in the south west of Rwanda, adjacent to the border with Burundi to the south, and in close proximity to Lake Kivu and the border with DRC to the west (Fig 1.). It is a 970 km² area of montane tropical rainforest within the Albertine Rift (the western branch of the Great Rift Valley). It is

contiguous with the Kibira National Park in Burundi, and together forms one of the largest areas of lower montane forest in Africa. It contains two large swamps, one of which (Kamiranzovu) covers around 13 km².

Nyungwe lies at an altitude of 1,600 – 2,950 m above sea level, and straddles the Congo-Nile divide. Indeed, one of the sources of the Nile (that which lies furthest from the mouth in terms of the distance travelled along its path) is said to lie within the forest. It provides important watershed protection for Rwanda, and supplies up to 70% of the country's water requirements. The climate is cool, with average minimum and maximum daily temperatures of 19° C and 10° C respectively. Being a rainforest, it is relatively wet, with an average of 1,744 mm per annum.

Biodiversity and conservation value

Both its size and altitude make Nyungwe a critical area for African rainforest conservation. It contains 13 species of primate (25% of the African total), including chimpanzees, owl-faced monkeys (a restricted range species), and unusually large groups of Ruwenzori colobus monkeys. A total of 260 bird species have been recorded, including 25 Albertine Rift endemics. More than 260 species of trees and shrubs have been recorded, of which at least 24 are believed to be Albertine Rift endemics (Plumptre *et al.* 2002).

Socio-economic environment

Nyungwe essentially straddles two provinces, Cyangugu to the west and Gikongoro to the east although it also touches Kibuye province to the north (Fig 2.). It is bordered by seven districts, with some of the highest human population densities in Africa (250-500/ km²). The forest itself is surrounded in many areas by buffer zones of tea and timber plantations, which benefit local communities. As an important watershed it also provides increased rainfall and water for agriculture, which is heavily developed in both provinces. However, both provinces have high levels of poverty, particularly Gikongoro that has poorer, more acidic soils than Cyangugu.

As a result of high human densities, poverty, and the demand for land and alternative sources of income, Nyungwe faces a number of threats from surrounding communities. Besides the inevitable encroachment and logging, hunting has extirpated most of the terrestrial large mammals, leaving only the primates and bush pigs. Fire used in the harvesting of wild honey has destroyed large areas of the forest on the eastern side, whilst mineral mining has attracted many people into the forest.

Institutional environment

Nyungwe was designated a Forest Reserve in 1933, but has only been managed since the mid 1980s. It is currently under the administration of the Rwandan Office for Tourism and National Parks (ORTPN) that was created in 1974 to manage protected areas and promote tourism. The government has recently approved a proposal for a change of status to National Park. ORTPN is assisted in its management of Nyungwe by the Wildlife Conservation Society (WCS), an international NGO that has been working in Nyungwe since the mid 1980s.

Demands on tourism to Nyungwe

As stated, Nyungwe is viewed at the national level as the principal focus of tourism diversification and growth in Rwanda. Alongside the mountain gorillas of PNV, it is at the core of a vision to generate almost \$100 million in GDP by 2010. Thus, there is a significant demand on Nyungwe as an engine of foreign exchange earnings.

On a smaller scale ORTPN, like many of their counterparts in other countries, are reliant upon tourism for much of their income, without which their conservation mandate is difficult to execute. Currently the great majority of this comes from gorilla viewing permits, but there is a need to diversify this income stream, and ORTPN are looking to both Nyungwe and Akagera National Parks to begin to recoup more of their management costs.

At a local level, and as a form of forest utilisation, tourism is also expected to contribute something to local livelihoods and development. Both ORTPN and WCS are keen to encourage greater linkages with local communities, and to generate benefits from tourism to that end. Both revenue sharing (from tourism revenues to ORTPN), and the creation of livelihood opportunities in tourism, are being considered by these organisations.



Fig 2. Nyungwe National Park and surrounding provinces and districts, with Lake Kivu to the northwest.

Purpose and structure of this document

Clearly there are numerous great expectations surrounding tourism development in Nyungwe. In an effort to begin the process of balancing and realising some of these expectations, a tourism development strategy for Nyungwe has been commissioned as part of a project funded by the Department for International Development (DFID) of the British Government. This document presents that strategy. It constitutes the outputs of a multi-stakeholder consultative exercise designed to set the agenda for the short to medium term development of tourism in and around Nyungwe (See Annex 1 for the terms of reference and methodology).

This document presents an analysis of the current situation and a strategic framework for achieving a desired outcome that incorporates as far as possible the requirements of the various stakeholders within the boundaries of a set of clearly defined underlying principles. It includes prioritised recommendations for specific actions in support of the strategy, and suggests a broad implementation timeframe.

In the interests of clarity and brevity, much of the background information and analysis is placed in a series of Annexes to the main document. These are appropriately referenced in the text.

2. THE CURRENT SITUATION

Background

Tourism in Nyungwe was established by the Wildlife Conservation Society (WCS), through its Project Conservation de la Forêt de Nyungwe (PCFN), in collaboration with ORTPN, in the late 1980s. The principal attraction was, and still is, the diverse array of primate species (especially chimpanzees and large groups of Rwenzori colobus monkeys), together with a wide variety of birds and the montane tropical rainforest environment. The principal activities are guided hikes along a range of forest trails established and maintained by PCFN/ORTPN, and guided primate tracking on and off these trails.

Visitation to Nyungwe has always lagged behind that to PNV and Akagera, and has never exceeded 3000 visitors per annum. Since 1994 it has remained below 1000 until 2003, when it jumped to 1785. Three quarters of these were foreign visitors, split 50:50 between resident expatriates and non-residents. Most of the latter are independent budget travellers, with perhaps 20% representing higher spending clients on organised tours.

The low levels of visitation compared with other parks are a result partly of distance (PNV and Akagera are both under two hours drive from Kigali, compared with four hours or more for Nyungwe). However, more important are a lack of infrastructure and product development. Accommodation, managed by PCFN, is limited and basic. Information, interpretation, communication and service provision are also limited, whilst the activities offered generally require a moderate level of physical fitness.

In fairness, WCS and ORTPN have achieved a great deal given their lack of professional expertise in tourism. However, under the current situation tourism in Nyungwe only caters for a limited market niche of low budget expatriates, explorers and some special interest groups that are willing to accept rudimentary conditions and minimal development. Thus, Nyungwe remains a relatively un-exploited resource for tourism that could be more effectively utilised by improving and diversifying the available product and infrastructure.

A detailed assessment of current tourism in Nyungwe is provided in Annex 3. This is summarised in the following SWOT analysis.

SWOT analysis

Strengths

- Dramatic mountain and forest scenery.
- Picturesque surrounding buffer zone and agricultural scenery, especially tea plantations.
- Wide range of primate species (including chimpanzees) within Nyungwe, some habituated and easily visible.
- Colobus troop permanently resident in a forest fragment on Gisakura Tea Estate.
- Chimpanzee troop permanently resident in nearby Cyamudongo community forest.
- Wide range of bird species, including Albertine rift endemics.
- A range of developed trails encompassing forest, mountain, marsh and waterfall attractions.
- Cool, favourable climate with few mosquitoes/low malaria risk.
- Existing accommodation at Gisakura, and existing infrastructure with potential for tourism at Kitabi in the east and Gisovu in the north.
- Easy access on tar roads from Kigali.
- Good regional access from Kampala/Nairobi.
- Good institutional linkages between ORTPN and WCS providing a support base.

- Good relationships with local authorities and development NGOs, and the beginning of a sensitisation process and beneficial linkages with surrounding communities.
- Potential as a resource for environmental awareness and education.
- Proximity of Lake Kivu and potential for the development of local and national circuits.
- Existence of mountain gorillas in PNV as a means of attracting international visitors to Rwanda, and upon which circuits incorporating PNV can be based.
- Commitment to tourism development at the national level.

Weaknesses

- Difficulty of seeing wildlife (primates, birds, butterflies, etc) within the forest.
- The limited habituation of primates, especially chimpanzees.
- The unpredictability of locating primates, especially chimpanzees, due to the large size of the forest and seasonal dispersal of these animals over large areas in search of food.
- The lack of facilities, under-development and level of difficulty of some trails; the lack of 'sedentary' attractions.
- The limited provision, quality and reliability of accommodation (especially power and hot water supplies).
- The limited provision of information and interpretation resources before and during visits.
- The difficulty of reliable communication for booking and organising visits.
- The limited capacity of human resources (language, interpretation and hospitality skills).
- The limited provision of food, drink and retail opportunities for visitors (consumables, maps, souvenirs, etc).
- The lack of provision of appropriate and sufficient accommodation, facilities, products and service for higher-end international visitors.
- The enforced proximity of tourists and park staff at existing accommodation and planned Kitabi complex.
- The proximity of Gisakura guesthouse to the main road.
- The lack of provision of appropriate and sufficient accommodation, facilities, products and service for domestic visitors and especially educational groups.
- The geographical separation of existing and proposed tourism infrastructure.
- The lack of exploitation of surrounding attractions adjacent to or outside the forest (especially tea plantations, Cyamudongo forest, and Lake Kivu).
- The lack of involvement of the private sector in tourism planning, development and management.
- The lack of, and lack of current opportunities for, community involvement in tourism – in particular the lack of linkages with the local economy.
- The imbalance in tourism provision (and associated opportunities for community benefit) between Cyangugu and Gikongoro Provinces.
- The lack of skills, understanding and capital resources to enable local participation in tourism.
- The low number of visitors, meaning low contributions to park revenues and local economies.
- The difficulty of access to surrounding attractions located off the main tar road, e.g. Cyamudongo forest, the Lake Kivu shore, and transport linkages north to Kibuye and Gisenyi.
- The limited number of direct international flights to Kigali from Europe, compared with neighbouring destinations.
- The prevailing international perception of Rwanda as an insecure destination, or residing in an insecure region.
- The visible military presence along the main road within the forest.
- Current low levels of visitation to Nyungwe, and of international travel more generally as a result of global terrorism and disease (SARS, etc.).

Opportunities

- Diversification of the tourism product in diverse locations within and adjacent to Nyungwe forest.
- Short-term maintenance and improvement of existing facilities at Gisakura, and longer-term replacement with mid-range accommodation facilities, to (1) to meet the needs of major current market segments, and (2) to continue to exploit nearby attractions (waterfall, colobus, etc).
- Maintenance of the Uwinka station and associated trails within the forest as a wilderness attraction for small numbers of active visitors.
- Renovation of the Kitabi complex to provide an education, interpretation and training centre, with associated accommodation and services, primarily for educational groups and trainees, but also catering for domestic, resident and less active visitors.
- Development of hardened nature trails, lookouts, and possibly a canopy tower in proximity to the Kitabi complex, to provide nature-based educational and recreational activities for larger groups of visitors.
- Habituation of chimpanzees, and provision of associated infrastructure at Cyamudongo 'community forest' in order to 'guarantee' chimpanzee viewing for special interest groups and higher-end ecotourists.
- Development and promotion of a tour of the tea plantation and factory at Gisakura (and potentially Kitabi) as complementary product.
- Development of a small-scale 'eco-lodge' and associated product, either in association with Cyamudongo or in Nyungwe, to cater for higher-end clients.
- Development of activities, infrastructure and transport on and adjacent to Lake Kivu, to increase length of stay locally and facilitate a national circuit via Lake Kivu to PNV.
- Creation of local employment (service staff, guides, educational, retail) in association with new accommodation and infrastructure at Kitabi, Cyamudongo, and elsewhere.
- Creation of an artisan centre at Kitabi to promote local handicrafts.
- Development of linkages with local associations to provide local produce to tourists and accommodation units.

Threats

- The risk of antagonising communities by not meeting local expectations regarding the benefits of tourism, and thereby reducing their support for Nyungwe.
- A lack of improvement of road access along the Lake Kivu shore, or investment in Lake transport to connect Nyungwe with Kibuye, Gisenyi and PNV.
- Future downturns in international arrivals to Rwanda as a result of global and regional insecurities, disease, etc.
- Increased competition from similar destinations in neighbouring countries.
- A lack of uptake by target markets (domestic visitors and school/educational groups, or higher-end international tourists).
- A lack of investment to facilitate development.
- Commercial investors being allowed to develop inappropriate products and infrastructure, and not respecting environment and community priorities.

3. THE DESIRED SITUATION

Managing expectations

As stated in the introduction, a great deal is expected of tourism in Nyungwe, and plans and ideas are being formulated on the basis of these expectations. However, some of these expectations may be unrealistic or based on misconceptions about tourism. This can be problematic if it places unrealistic demands upon tourism that cannot be fulfilled. At this point it is worth considering where some of these expectations and misconceptions lie, and revising them where necessary.

Projected growth in targeted markets

The framework for current thinking regarding Nyungwe tourism is the national vision of projected growth in high-end eco-traveller arrivals. To reach national revenue targets of \$98 million by 2010, Nyungwe is expected to attract 19,600 visitors by that time, spending on average two nights at the forest out of a seven day trip to Rwanda, and spending some \$320 daily (see Annex 2). The visitor growth model for this projection is based upon the following:

1. An assumed baseline of 525 visitors in 2003.
2. Exponential growth to 2010, at a mean annual rate of 68%.
3. A reduction in the proportion of arrivals visiting PNV from 95% to 50% (to circumvent the limited capacity of 11,680 permits for gorilla viewing), and a consequent increase in Nyungwe visitors who do not visit PNV.
4. The provision of at least 150 beds of the appropriate standard by 2010.

However, it is very likely that this projection may be over-optimistic. In relation to the above points:

1. Although 697 non-residents were recorded visiting Nyungwe in 2003, it is likely that <20% of these represent the targeted high-end 'eco-traveller' market segment. The majority are independent 'explorer' travellers or families and friends of resident expatriates (see Annex 3). The baseline for growth in this segment is therefore more likely to be closer to 150 visitors.
2. The projected growth rate is very optimistic, predicting visitation that is higher than all but the most heavily visited protected areas in the region. Moreover, the current views of international tour operators suggest that security concerns and unfavourable travel advisories limit their potential to sell Rwanda, let alone Nyungwe, that is situated in an area of above-average concern. Many operators will be unwilling to visit an area if security concerns invalidate their liability insurance cover.
3. Overcoming the strength of the gorilla attraction at the higher end of the market is going to be very difficult to achieve. Apart from the genocide, it is the only thing most people in Europe and America know about Rwanda, and was recently voted second best wildlife attraction in Africa (after the Masai Mara wildebeest migration) in Travel Africa magazine. Current thinking among British operators who were approached about selling Rwanda is that it would most likely be as a gorilla extension to visits to Uganda, Kenya or Tanzania. Equally, the proposed 'primate discovery tour' designed to attract eco-travellers relies heavily on the gorillas as well as Nyungwe – indeed those operators selling an extended tour to Rwanda are using this model (see Annex 3).
4. Given the above, the projected infrastructure needs for the higher end market segments are also likely to be unrealistic. A more cautious assumption would be that some 25-30% of all international gorilla-viewing tourists might visit Nyungwe by 2010 (c.3,000 visitors).

These would require 25-30 mid-range beds for a two-night stay and at average bed occupancy of 60%. This might be supplemented by an estimated 2-3,000 resident and independent visitors, requiring a similar number of lower-end beds. Whatever the projections, there is a clear need for better accommodation provision, but not for large increases in capacity. It would be most advisable to incrementally increase capacity at the most appropriate standard in line with observed rates of growth over the coming years. It must also be recognised that, whilst infrastructure (and marketing) are important to generate growth, it is equally if not more important to have a guaranteed product to sell.

Market niches

The current focus on high-end eco-travellers as a target market is compatible with national development goals. However, there are a number of external requirements necessary to achieve the OTF vision of rapid growth in international visitation in the higher-spending market segments. These include an estimated \$100 million in investment in infrastructure and capacity, increased direct international air linkages, the development of a domestic tourism culture and service industry, improved regional political stability, and an improved international perception of Rwanda as a safe tourism destination with quality attractions. Delays in meeting these requirements are inevitable. This suggests that this market segment should not form the sole basis of the Nyungwe strategy, and particularly not in the short term.

Tourism usually undergoes a lifecycle of growth from explorer/pioneers, through independent backpackers, to special interest groups, general interest groups and beyond. There are good reasons for this observed pattern. The more intrepid travellers forge a trail, opening up a destination and generating external awareness. This creates demand in the next segment that is less intrepid, a little more demanding but also higher spending. This progression stimulates international operators to develop itineraries, and the domestic industry to enhance the quality and availability of the product accordingly.

Whilst it is possible and often desirable to accelerate the lifecycle with infrastructure development and marketing, this often requires the import of skills and expertise from abroad. Even then, it still takes time to change attitudes and awareness in the marketplace – it is often said that two thirds of all tourism consists of repeat visits and personal referrals from friends and relatives.

The result of this is that (1) it is better to walk before you try to run, and (2) it is important to recognise where in the lifecycle you are so as not to overlook existing market segments. Rwanda is a re-emerging destination requiring time as well as investment to achieve its goals. Even then it will require some providence regarding regional stability and international travel tastes. Nyungwe is currently a destination enjoyed primarily by resident and independent non-resident market segments. Whilst it is important to diversify and target higher-end segments, it is also important to cater to existing segments. Although they may be lower spending, they have a range of potential advantages:

- They often stay longer.
- They generally have lower expectations regarding the quality of infrastructure and services, so are easier and cheaper to satisfy.
- They tend to engage more with the local economy, spending more locally on supplies, transport, etc., and demanding less by way of goods and services that must be imported from elsewhere.
- They often consume fewer resources (hot water, power, etc.) and as a result place less pressure on utilities and natural resources.
- They offer a foundation upon which the domestic tourism industry can build and gain vital experience as it develops towards higher goals.

Similarly, although currently only a small proportion of the existing market, domestic tourism is an area with much potential for growth and development (here domestic tourism is used to describe tourism undertaken by Rwandan citizens. Although expatriate residents can be

considered domestic tourists, they are treated separately here). Again, this market segment does not generate foreign exchange for the nation, but it does have two important values:

- The development of a domestic culture of tourism is likely to stimulate the growth and increased capacity of Rwanda's tourism industry. As larger numbers of Rwandans experience tourism from the demand side they will begin to understand it, begin to demand higher standards, and be able to engage on the supply side more effectively.
- Domestic tourism to Nyungwe has the potential to generate environmental awareness among the population, which would contribute to conservation goals.

Government and NGO involvement in tourism

In a small emerging economy where private investment is slow to develop, it is tempting to deploy government investment in the hospitality sector through the provision of hotels and other infrastructure. This is particularly the case within national parks that are protected and managed by government agencies, and where private or commercial influence has potential risks.

Equally, in a situation such as Nyungwe where there has been considerable NGO support of conservation efforts, and where tourism activities have been established by an NGO, there is a temptation to wish to maintain the situation given the history of 'investment' and experience that has been built up, and the over-riding conservation concerns of Nyungwe.

However, neither of these conditions is conducive to the long-term growth and development of a high quality and competitive domestic tourism industry, because:

- Governments and NGOs rarely have the professional expertise commercial understanding of tourism, and so do not recognise the needs and requirements of international tourists, and what is most likely to sell, particularly at the higher end of the market.
- Such involvement can place private entrepreneurs at a considerable commercial disadvantage in the short term. The resources and effective subsidisation that are available to governments and NGOs, but rarely so to the private sector, can result in unfair competitive advantage. In the long term, however, they are likely to stagnate or fail because of a lack of professionalism.

The current situation is that there is an existing (NGO-run) guesthouse in Gisakura, and equivalent housing under ORTPN control in Kitabi that could be renovated for tourism accommodation. These could provide basic facilities for lower-end market segments, but are most likely to succeed if both their renovation and management are placed under private management contracts. Since this is likely to be unacceptable to WCS/ORTPN which need facilities for researchers and guests, then alternative options must be developed nearby.

At the higher end, there is already talk of attracting donors or developers to identified sites close to the main road within Nyungwe for the construction of hotels or lodges. These sites are inappropriate for the type of market being targeted, because they are too close to the road. The appropriate location and form of development must take into account a range of commercial and environmental factors. The appropriate role of government, especially in the case of national parks, is to ensure that environmental standards are upheld whilst enabling the private sector the freedom to make decisions that are commercially viable. Thus, it is desirable to establish a government-private sector partnership at the outset of any planned development, rather than once it has taken place.

Geographical considerations

Tourism in Nyungwe has evolved where ORTPN/PCFN facilities were established. Thus:

- Most visitors who stay overnight do so at the PCFN Gisakura guesthouse to the west of the forest, where some popular attractions also exist.
- Most trails begin at Uwinka in the centre of the forest, where most of the established trails begin and where primates appear most numerous and diverse.
- Future tourism plans are based in part on the provision of a visitor centre (interpretation and handicrafts) and accommodation at the renovated Kitabi complex to the east of the forest.
- Plans for hotel developments have focused on abandoned road construction and military camps along the main tar road through the forest.

Clearly there are some geographical constraints in having multiple centres of tourism activity some distance apart:

- Visitors staying at Gisakura (and on a circuit via Lake Kivu) are unlikely to return to the Kitabi complex to use the visitor centre once they have initially passed by. Since circuits from Kigali will have already taken in Butare Museum and possible other cultural sites along the way, it may be quite late by the time they reach Kitabi and they will have been travelling for many hours. Thus, by the time most groups reach Kitabi they will want to head straight on to their accommodation further west to relax.
- Attempting to accommodate international visitors at Kitabi, even in the short term, has numerous drawbacks. First, the forest on the east is less picturesque and more disturbed than on the west. Second, there are currently no activities developed and it is much further from the Uwinka trails and the attractions on the west of the forest (waterfall, colobus troop, Cyamudongo forest, Lake Kivu). Third, it is generally unacceptable to most foreign visitors to be housed in a park headquarters surrounded by rangers and offices.

The Kitabi side does have some benefits, especially its proximity to Butare and Kigali, and its potential for the development of trails and other activities. It may, therefore, be best thought of primarily as a stand-alone 'destination' targeting specific segments, with the western and west-central side of the forest consisting primarily of an alternative 'destination' targeting other markets. There is likely to be some crossover between the two but it should not be universally assumed.

As stated, the sites under consideration for hotel/lodge development within Nyungwe are too close to the main road to be viable, but access to more secluded parts of the forest does not currently exist, and developing it could lead to significant disturbance and increased risks to a particularly fragile environment. The following constraints to such a development may exist:

- The provision of power, water and communication is more difficult and costly than outside the forest.
- Dampness and humidity are greater within the forest.
- To create a view, it would be necessary to put the accommodation on higher ground that is colder, more exposed, and would inevitably lead to greater forest disturbance.
- There is no guaranteed product within the forest – it is generally harder to see anything within the forest than outside. Indeed, two of the three most popular visitor activities are the waterfall trail and the tea estate colobus troop at Gisakura (see Annex 3).

A more appropriate, feasible and sustainable option may be to consider a site outside or on the edge of the forest, with views across it and the picturesque surrounding landscape, where guaranteed attractions can be provided in close proximity but where the option to trek within the forest is not compromised.

Time considerations

In an area as diverse as Nyungwe, it is tempting to consider large numbers of potential or actual tourist attractions for development and marketing. Whilst a diversity of opportunities has the potential to attract a larger and more diverse range of visitors, it is important to plan such an approach carefully:

- Any destination requires an image, and a core product, such as primate viewing, that is guaranteed and that requires the focus of attention in the planning and development stages.
- Any visitor, particularly on an organised tour, has only a short amount of time that prevents extensive travel to remote locations, and means that only a few selected activities are likely to be chosen.
- More independent visitors with more time, or repeat visitors, or those looking for different activities and attractions that are off the beaten track, may require alternative attractions, but these are likely to draw fewer visitors and therefore are of secondary significance in the list of development priorities.
- Within Nyungwe, there is much talk of reopening access to the source of the Nile, and developing tourism in the bamboo forests of the south in association with the restricted range Owl-faced monkeys. Although unique attractions which will increase the diversity of options within Nyungwe, both are relatively remote and likely to attract small numbers of special interest groups with the time and inclination to make the effort to visit. Thus they should be considered as secondary priorities within this plan. Likewise, marginal attractions beyond the boundaries of the forest, such as hot springs, caves and waterfalls identified by communities as potential attractions (see Annex 4), are unlikely ever to be of more than marginal interest to a few visitors.

Tourism and biodiversity

It should be recognised that, no matter how ecologically important or species rich the forest is, tourists are rarely attracted by biodiversity *per se*. The first national parks established with tourism in mind in North America were done so for their scenic value, and not their biodiversity. In Nyungwe, the scenery (to which biodiversity obviously contributes) is one aspect of the attraction, but guaranteed sightings of primates, particularly chimpanzees and colobus, are particularly important for the international (US and European) markets (see Annex 3).

It is therefore less important to develop tourism in the heart of the forest or where biodiversity is highest, but rather in places where attractions can be guaranteed without significant effort. This is more likely to be at the edges of the forest (where there are often good views) or in isolated forest fragments (such as Cyamudongo forest, or that on the Gisakura tea estate) where primates exist and can be easily viewed once habituated, because they are unable to range so widely. Equally, from a conservation perspective it may be more desirable to have tourism located in such places where it is less likely to negatively affect biodiversity.

Small remnant forests such as Cyamudongo are less important ecologically than Nyungwe, but if they can be exploited as 'honeypots' of tourism development that contribute to the conservation of the wider forest then it may be possible to approach something of a win-win scenario for tourism and the environment. Indeed, it may even constitute a triple-win given that such outlying areas are also in closer proximity to local communities and therefore offer the potential for community participation and benefit as well.

Benefit sharing with local communities

Community participation and benefit sharing for poverty alleviation have become important considerations for protected area authorities, as this is seen as a way of increasing local support for conservation. One of the strategies employed is the distribution of a proportion of tourism revenues, either as household dividends or more frequently as a contribution to a community trust fund that is used for development projects and other local needs.

Such schemes have been implemented in Uganda (distribution of a proportion of gorilla viewing fees around Bwindi and Mgahinga), Kenya (where Kenya Wildlife Service promised, but failed to deliver, some 25% of park fees to surrounding communities, and where local councils controlling some national reserves are supposed to distribute 19% of entrance fee

revenue to communities), and Madagascar (where a proportion of revenues from tourism in Ramanofana National Park are distributed to village committees).

Such a mechanism is being discussed within ORTPN. However, it is important to consider some experiences from elsewhere:

- It can only really be considered where tourism income is high enough to cover both investment in communities and investment in core management activities.
- It often raises expectations that are difficult to sustain when income is low or fluctuates. As a result it can end up antagonising communities rather than placating them.
- It can only provide negligible household dividends, especially where surrounding population density is high.
- If given to a community trust fund or committee to manage, there are often additional difficulties. Funds are often mismanaged, misappropriated or misused. Equally, they are often used for development projects (roads, schools, etc.) that effectively subsidise or replace the obligations of government.
- The benefits received are not always associated with the park and its' conservation, so do not always act as an incentive to conserve or change behaviour.

Under the right circumstances revenue sharing can be a useful tool. In Nyungwe, however, the current tourism revenue barely covers the costs of guides' salaries. If resources are available from ORTPN via gorilla revenues then they would be better used to assist communities to develop active participation in tourism (through training, micro-credit schemes and the establishment of private sector linkages and partnerships) than as handouts for mainstream development projects.

National and international tourism circuits

It is already well recognised that Nyungwe will be more likely to thrive as an international tourist destination if it is incorporated as part of a wider circuit rather than being a stand-alone destination. Forest walks and the possibility of seeing primates are not enough to attract the majority of international visitors.

Within the national tourism development strategy, a 'primate discovery tour' has been proposed, that includes Nyungwe as a second primate site that is complementary to the mountain gorillas and linked to PNV via Lake Kivu (Fig 3, and Annex 2). Such a circuit is already in effect being marketed by some British operators and operated by a Ugandan-based ground handler. This involves one night in Kigali, two nights near Nyungwe, one night in Kibuye and three nights in Kinigi. Other operators run similar circuits with time in Uganda at the beginning and end.

Although many visitors to Rwanda come purely to see the mountain gorillas as an extension to a visit to another regional destination such as Kenya or Tanzania, some are beginning to view Nyungwe as a possibility for chimpanzee viewing as well. Many of the chimpanzee sites in Tanzania are very remote, difficult and expensive to access, and even those in Uganda are several hours from Kampala. Nyungwe benefits from its proximity to Kigali (itself only a short flight from Nairobi) and could become a competitive chimpanzee destination if sightings could be guaranteed.

Tour itineraries are generally very tight, and incorporating two or more nights at Nyungwe would demand quality attractions to fill the time, and easy accessibility. The major current limitations to the development of circuits incorporating Nyungwe are the lack of suitable accommodation in or near Nyungwe, the lack of decent road or lake transport from Cyangugu to Kibuye and Gisenyi along Lake Kivu, and the lack of guaranteed products in Nyungwe itself. The following sample itinerary (based on existing marketed itineraries) includes current and potential attractions that are most likely to be taken up by tour groups, and would provide a varied, stimulating and guaranteed experience:

Day 1 ^a	
Morning	Depart Kigali, visit Butare museum, lunch in Butare.
Afternoon	Travel (via Kitabi HQ?) to accommodation on west of Nyungwe
Day 2 ^b	
Morning	Either: <ul style="list-style-type: none"> • Forest walk on Nyungwe trail for primate viewing • Chimp tracking in Cyamudongo • Walk on waterfall trail • Bird watching on Kamiranzovu marsh trail
Afternoon	Either <ul style="list-style-type: none"> • Tour of tea plantation and factory • Visit to colobus troop on tea estate • Bird watching/bird walk around local area • Sun-downer boat ride on Lake Kivu
Day 3	
Morning	Boat (or road) journey to Kibuye. Visit Bisesero Genocide Memorial (optional) ^c , lunch in Kibuye
Afternoon	Either <ul style="list-style-type: none"> • Lake activities and overnight in Kibuye • Continue to overnight in Gisenyi
Day 4	
Morning	Continue to Ruhengeri/Kinigi to hotel
Afternoon	Local activities
Days 5-6	
Morning	Gorilla tracking
Afternoon	Local activities
Day 7	
Morning	Travel to Kigali
Afternoon	Kigali tour, flight home

^a International visitors arriving in the early morning could leave straight for Butare, or more preferably an additional night in Kigali could be scheduled to allow recovery and/or city activities.

^b In this itinerary, two nights and one day are scheduled for Nyungwe. Given the range of activities this could be lengthened to three nights and two days, to allow two full days of activities. The third night could be spent on Lake Kivu to enable a lake activity.

^c It is not advisable to make genocide memorials compulsory. Not all visitors will wish to experience these generally sombre places, and they should in any case not be degraded to the role of tourist attraction. However, many visitors will wish to pay their respects and reflect on the events of 1994. In this regard, it is recommended that Murambi not be promoted as part of an itinerary unless specifically requested. Apart from time limitations on that part of the itinerary (especially if Kitabi is developed and included), Murambi is a particularly difficult and graphic experience that many visitors will find upsetting and which may cloud the remainder of their tour. Existing itineraries are currently including Bisesero as a calmer and more reflective experience.

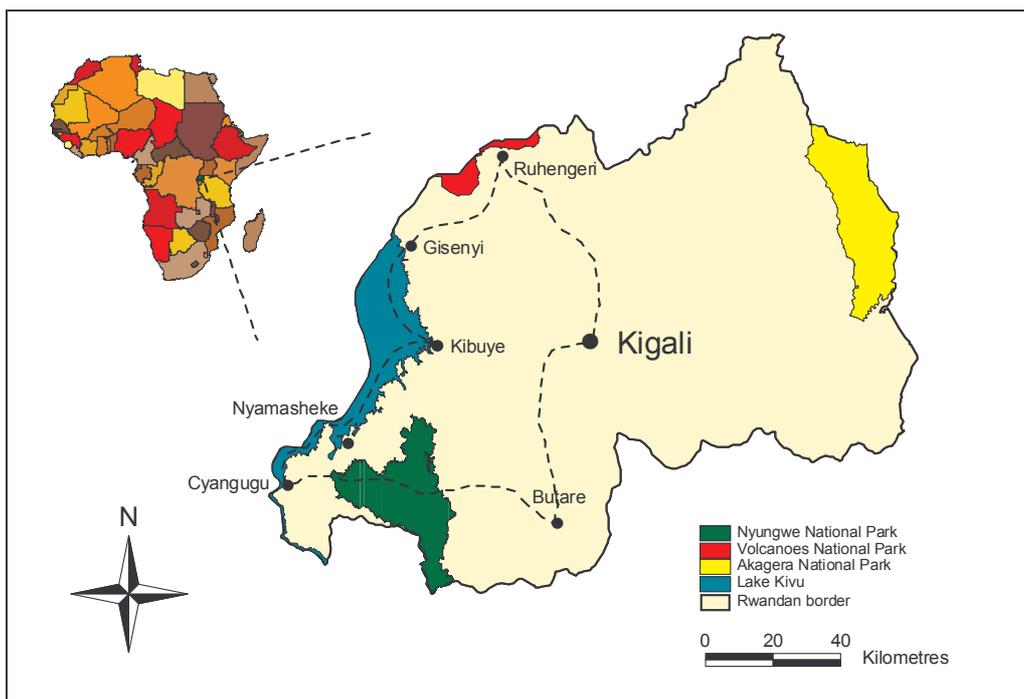


Fig 3. Tour circuit taking in Nyungwe and Volcanoes National Parks.

4. DEVELOPING A STRATEGIC PLAN

A strategic plan has a series of components, beginning with a vision of where things are heading in the long term, and ending with a set of shorter-term practical actions that if achieved will contribute to fulfilling the vision. It is also based upon a set of guiding principles that set the agenda for action, and a set of assumptions that describe the wider conditions within which the strategy is likely to operate.

Vision

A vision is the desired future state. It may not be achievable in the short or medium term, and certainly not within the time frame of the current management programmes or projects. It represents for the future, which will guide current efforts and strategies. Just like a mountain in the distance, which needs to be climbed, it sets the overall direction and level of achievement, which enables the strategy team to concentrate on the immediate process of overcoming obstacles in pursuit of the vision. The vision is, therefore, the pinnacle of the strategy.

Overall goal

The overall goal is the immediate objective of the current strategy, achievable within the time frame and with the resources available. The achievement of the overall goal should be a logical consequence of the achievement of all of the necessary strategic objectives, and should make a significant contribution of the stated vision.

Strategic objectives

These are the outcomes that are required to achieve the overall goal of the strategy. Strategic objectives should be both necessary and sufficient. That is, each strategic objective should be necessary to achieve the goal, and the combination of strategic objectives should be sufficient to achieve the goal without additional objectives. There is no particular logical order to the strategic objectives, and many have overlapping or interconnected actions.

Actions

Each strategic objective will have a range of specific actions that contribute to achieving the objective. These are the practical things that require implementation. They may or may not have a logical order, but should have a time frame attached to them.

Putting the strategy together

The logical statement of the strategy reads:

“If Actions 1.1 to 1.6 are implemented, then Strategic Objective 1 will be achieved. Similarly, implementing Actions 2.2 to 2.5 will ensure the achievement of Strategic Objective 2, and so on. If Strategic Objectives 1 through 10 are achieved, then the Overall Goal will be achieved, and a significant contribution will be made to the achievement of the Vision”.

5. PRINCIPLES AND ASSUMPTIONS

Guiding Principles

A set of principles provides a guiding framework for the implementation of the strategy. The principles set out the foundations upon which sustainable development are most likely to be achieved. Any proposed actions should be tested for their compatibility with the guiding principles.

Tourism development in and around Nyungwe should be based on the principles of ecotourism, namely that it should be environmentally benign, contribute positively to conservation efforts (through both income and awareness-raising), and contribute to surrounding local development. The following guiding principles are proposed:

1. Tourism development should first and foremost support and be compatible with conservation, and ensure the continued existence of the Nyungwe forest.
2. Tourism development should benefit the people of Rwanda, but in particular should contribute to local rural development objectives, whilst taking into account national development goals.
3. Tourism is a recreational pursuit, and tourism development should strive to maintain the utmost levels of enjoyment and satisfaction among visitors.
4. Forest and montane environments are some of the most fragile and vulnerable to disturbance, and the environmental impacts of any proposed development should be comprehensively assessed in advance.
5. Developments that are small-scale are more likely to minimise environmental impacts and spread benefits more widely.
6. Developments on the edge or outside of the forest are more likely to minimise environmental impacts and generate greater local community benefits.
7. Tourism products and activities within national parks should be based upon and complement the natural environment, with minimal modification or manipulation.
8. It is generally preferable to build incrementally on existing products and services rather than start afresh.
9. The diversification of the product and targeted market segments spreads the risk and increases overall market size, and is therefore is the key to growth and sustainability.
10. Different market segments have different needs that are not always complementary, and may therefore have to be offered in different places.
11. Different market segments generate different levels of growth and potential impact, and therefore require targeted planning and management that recognises these differences.
12. Domestic tourism is a vital part of tourism development, offering the potential for more stable growth with less vulnerability to international or regional events.
13. Destinations are more likely to attract visitors if they are marketed as part of a package, in the context of surrounding local attractions and/or as part of a wider circuit.

14. Tourism development should be planned and managed by professionals, whilst conservation management and law enforcement within national parks should be undertaken by relevant government agencies with NGO support. Where the two meet, there is a need for cooperation and partnership.
15. Local community involvement in tourism should be based as far as possible upon empowerment rather than handouts, with commitment and investment on the part of communities themselves.
16. Proposed developments and actions should all contribute to the over-riding vision and goal of the development strategy, and should be achievable in the short to medium term.
17. Projects that require smaller-scale funding are more likely to be achievable more rapidly.
18. The benefits of tourism should not be over-promoted; it is important to manage expectations at realistic levels both locally and nationally.
19. Tourism is not a panacea for conservation and development, but it can be an effective contributor to conservation, local development and GDP if properly planned and managed.

Assumptions

The assumptions contained within the strategy relate to factors of the external environment within which the strategy must operate, but over which its facilitators have little or no control. They naturally contain a degree of uncertainty, but the more realistic the assumptions, the more likely they are to be met. Any proposed actions should take into account these assumptions.

The strategy for tourism development in and around Nyungwe is based upon the following assumptions:

1. There will not be a major change in attitude towards Rwanda as a tourism destination among existing or potential overseas markets in the short term.
2. The target market of high spending 'eco-travellers' on organised tours will continue to be drawn to Rwanda primarily for mountain gorilla tracking.
3. Donor organisations will continue to overlook the tourism sector as a direct funding priority, but may support rural development, poverty alleviation and conservation initiatives.
4. There will be some interest in investment in tourism from the private sector.
5. Proposed improvements in tourism nationally (infrastructure, human capacity, etc.), as outlined in the national development plan for tourism, will take place.

6. STRUCTURE OF THE STRATEGY

The following vision, goal and ten strategic objectives are proposed:

Vision

To achieve sustainable tourism that maintains the integrity and supports the conservation of Nyungwe National Park whilst benefiting surrounding local populations in particular and Rwandans as a whole.

Goal

To stimulate the growth of tourism to Nyungwe through the development and promotion of appropriate tourism products that meet the needs of current and potential market segments within a framework of environmental conservation and sustainable rural development.

Strategic objectives

1. Consolidation of existing market segments

Growth in existing market segments will be achieved by improvement and augmentation of existing infrastructure, products and services.

2. Attraction of new international market segments

Currently under-represented higher-end international market segments will be attracted and maintained by the development of appropriately targeted infrastructure, products and services.

3. Attraction of new domestic market segments

Currently under-represented domestic market segments will be attracted and maintained by the development and promotion of appropriately targeted infrastructure, products and services.

4. Community participation

Tourism development will provide and facilitate the maximum opportunities for the participation and benefit of surrounding local communities.

5. Environmental sustainability

Tourism development will be planned, implemented and managed with adequate regard for environmental and conservation priorities.

6. Capacity

Institutional and human capacity to co-ordinate, manage and implement tourism will be developed and maintained to necessary and sufficient levels within ORTPN and its NGO, private sector and community partners.

7. Communication

Accurate and up to date information on tourism infrastructure, products and services in Nyungwe will be made available to tourists and operators in advance of their visit in a timely manner and through a range of media.

8. Education and interpretation

Increased environmental education and visitor satisfaction will be facilitated by provision of the highest quality of interpretation to visitors during their visit through a range of media and resources.

9. Monitoring and evaluation

An integrated monitoring system will be developed and maintained within ORTPN to provide the necessary and sufficient information for regular status reports, evaluation and adaptive management of tourism in accordance with the guiding principles of the strategy.

10. Co-ordination and support

The interests and commitment of the various stakeholders in tourism will be harnessed through collaboration and shared responsibility to ensure the effective implementation of this strategy.

7. STRATEGIC OBJECTIVES

1. Consolidation of existing market segments

Growth in existing market segments will be achieved by improvement and augmentation of existing infrastructure, products and services.

Rationale

Existing market segments are mainly independent overseas travellers and residents, who are active, and interested in primate viewing and forest walks. They require comfortable but not excessively luxurious accommodation and facilities provided to a quality standard at reasonable prices. To consolidate growth in these segments requires improvement in existing facilities.

Action points

- 1.1 Improve existing accommodation at Gisakura guesthouse in the short term, but phase out tourist visits once an equivalent privately managed accommodation unit is operational:
 - Ensure more reliable hot water supply (and power).
 - Provide a place (veranda/gazebo) with seating for open-air relaxation.
 - Provide a bar/shop and waiter with extended opening hours.
- 1.2 Facilitate the development of a privately planned and managed, mid-range guesthouse on the west side of the forest near Gisakura:
 - Identify a location off the main road, with a view over the tea plantations and forest.
 - Provide initial capacity for c.24-32 beds in 12-16 rooms.
 - Provide a restaurant, bar and shop to maximise retail opportunities.
- 1.3 Limit tourism accommodation at Uwinka to upgraded campsite facilities.
- 1.4 Improve access and facilities on existing trails at Uwinka and Gisakura:
 - Assess all trails and provide additional steps and handrails at steep or slippery sections.
 - Add additional benches at selected natural lookout points, particularly after steep climbs.
 - Add a viewing platform or hide overlooking Kamiranzovu swamp to facilitate bird and wildlife viewing.
- 1.5 Ensure continued access to the habituated colobus troop in the remnant forest on Gisakura tea estate after privatisation. This will require input and collaboration prior to, and during, the privatisation process.

2. Attraction of new international market segments

Currently under-represented higher-end international market segments will be attracted and maintained by the development of appropriately targeted infrastructure, products and services.

Rationale

To attract higher spending visitors will require a guaranteed core product, based around primate viewing, together with high quality complementary product to enhance visitor experiences and opportunities locally. It also requires links to a wider national circuit. Accommodation does not need to be high end at the outset (Action point 1.2 will cater for most mid-range clients), but the provision of luxury accommodation once the market has been established and investors identified would enhance the product.

Action points

- 2.1 Establish chimpanzee tracking at the 'Cyamudongo community forest' (see Action plan 1):
 - Establish well-maintained trails
 - Habituate the chimpanzees
 - Upgrade the access road with murrum where necessary
 - Explore the medium term possibility of establishing a community-based camp or lodge adjacent to Cyamudongo forest.
- 2.2 Develop and market a tea plantation and factory tour (see Action plan 2) in partnership with the Gisakura tea estate.
- 2.3 Facilitate the development of activities on Lake Kivu (see Action plan 5):
 - Lobby for the development of lake transport between Cyangugu and Kibuye/Gisenyi.
 - Assist a local association with the provision of pleasure-boat trips from Cyangugu, Nyamasheke or Kumbya.
- 2.4 Once the market is established, explore the possibility of private sector investment in a small-scale, higher-end 'eco-lodge' and associated trails/activities on the western edge of the forest.

3. Attraction of new domestic market segments

Currently under-represented domestic market segments will be attracted and maintained by the development and promotion of appropriately targeted infrastructure, products and services.

Rationale

Domestic markets offer opportunities for stable growth and development. The Kitabi site to the east of the forest offers existing infrastructure at an accessible site that is isolated from the most biodiverse and environmentally fragile parts of the forest. Thus it has potential for greater growth based around the development of hardened trails and educational activities for families, school groups, etc.

Action points

- 3.1 Renovate the Kitabi site with provision for, primarily, domestic tourism and educational groups (see Action plan 3):
 - Create an education, interpretation and handicraft centre aimed at children, families and educational groups.
 - Renovate a subset of houses for low cost, self-catering family or small group accommodation.
 - Make provision for larger, catered educational groups.
- 3.2 Develop hardened trails and nature walks through the tea plantation, timber buffer zone and into the forest adjacent to Kitabi.
- 3.3 Explore the possibility of constructing a canopy-viewing tower within the forest (see Action plan 4).
- 3.4 Develop linkages with Kumbya mission retreat on Lake Kivu and promote as an alternative base for educational groups within relatively easy access of Nyungwe.

4. Community participation

Tourism development will provide and facilitate the maximum opportunities for the participation and benefit of surrounding local communities.

Rationale

Community participation is an integral part of sustainable tourism development. There are seven districts, in two provinces, bordering Nyungwe, and it is important to spread the benefits of tourism between them as far as possible. In principle, creating economic linkages and employment is better than providing handouts. The establishment of Kitabi complex will assist with generating benefits in Gikongoro Province, whilst the expansion of accommodation and development of new products to the west will improve benefits in Cyangugu province. This strategy will attempt to support at least one community linkage in each of the seven districts surrounding Nyungwe. Access constraints mean that for some of the more remote districts direct contact with tourism will be difficult in the short term, but the facilitation of economic linkages is possible.

Action points

4.1 Ensure maximum direct employment opportunities for community members in the seven districts surrounding Nyungwe:

- In Gatere, through Gisakura accommodation and retail outlets, and tea estate tours.
- In Nyamasheke, through the development of pleasure-boat services.
- In Bukunzi, through trail construction and chimpanzee habituation at Cyamudongo.
- In Bugurama, through support of local co-operatives (see 4.2 below).
- In Mudasomwa, through the Kitabi complex handicraft centre and providing visitor services.
- In Mushubi, explore the longer-term possibility of improving access to the source of the Nile
- In Nshilli, explore the longer-term possibility of improving access and security to the southern bamboo forest where Owl-faced monkeys may be habituated.
- In Kibuye province, explore the possibility of providing northern access into the park from the Kibuye road, with associated local opportunities.

4.2 Ensure maximum economic linkages with local communities through the support of agricultural and manufacturing co-operatives:

- Assist the development of local co-operatives to supply locally produced fruit and vegetables, meat/fish, beekeeping/honey (for consumption and export), packaged tea, and local handicrafts.
- Assist with training for production and quality assurance.
- Facilitate access to the tourism market through accommodation/restaurants and retail outlets at Kitabi, Gisakura and Uwinka.
- Work with development NGOs (GTZ PASUD, etc.) that have experience assisting such associations in the region.

4.3 Assist the development of local business opportunities in tourism:

- Facilitate private manage contracts over accommodation and retail outlets and/or tourism facilities in association with Kitabi and Gisakura.
- Facilitate micro-credit financing opportunities for small scale businesses and co-operatives.

5. Environmental sustainability

Tourism development will be planned, implemented and managed with adequate regard for environmental and conservation priorities.

Rationale

Conservation is the underlying priority for Nyungwe, and any development or utilisation must take this into account. A set of checks and balances must be put in place by ORTPN to ensure that all development is sustainable, and that all activities in the forest conform to established standards that minimise negative environmental impacts.

Action points

- 5.1 Concentrate development on more resilient sites, existing sites and those outside of the forest, whilst taking into account commercial perspectives
- 5.2 Establish environmental impact assessment guidelines and procedures that are compulsory for every proposed development prior to approval.
- 5.3 Ensure that all developments/operators adhere to recognised international guidelines regarding environmental standards and responsible behaviour with regard to resource consumption, pollution and waste management.
- 5.4 Retain the authority to revoke permits and management contracts if environmental performance fails to meet required standards.
- 5.5 Limit off-trail access by visitors as far as possible.
- 5.6 Monitor and manage trails in line with their level of use, regulating access and hardening heavily used trails (e.g. with boardwalks) where necessary.
- 5.7 Produce a set of responsible environmental guidelines for visitors and operators to read upon their arrival.
- 5.8 Ensure that guide training incorporates responsible environmental practice.

6. Capacity

Institutional and human capacity to co-ordinate, manage and implement tourism will be developed and maintained to necessary and sufficient levels within ORTPN and its NGO, private sector and community partners.

Rationale

Although ORTPN manages the forest, it has little tourism expertise. Equally, within Rwanda the level of professionalism at all levels, from national operators to local tour guides, requires improvement. Capacity building is an integral part of tourism development that can best be achieved through strategic partnerships, study tours and targeted training.

Action points

- 6.1 Develop public private partnerships for tourism development to utilise commercial expertise and resources.
- 6.2 Facilitate a consultancy tour to Nyungwe by recognised international experts from within the tourism industry with practical, commercial experience in countries with similar forest attractions (Costa Rica, Indonesia, etc.) to advise on the potential and practicalities of developing commercially viable infrastructure and activities.
- 6.3 Undertake a study tour for the Nyungwe forest tourism steering committee (see point 10.1 below) and government representatives to countries with similar conditions and attractions to Rwanda (e.g. Sri Lanka for forest and tea plantation tourism, Ghana for canopy walkways and domestic tourism).
- 6.4 Improve guiding, interpretation, hospitality and language skills among guides and other point-of-contact staff through a nationally recognised training and certification scheme.
- 6.5 Ensure that sufficient guides with the relevant skills are located at each place where guided activities begin.
- 6.6 Improve the capacity of guesthouse staff and resources by contracting a private management company to run accommodation units, and facilitating training for community members in hospitality management.
- 6.7 Develop a code of conduct for tour operators to Nyungwe that will serve to improve and maintain quality of service and performance.
- 6.8 Provide the opportunity for feedback from visitors regarding capacity and service, and act on the results (see Strategic objective 9 below).

7. Communication

Accurate and up to date information on tourism infrastructure, products and services in Nyungwe will be made available to tourists and operators in advance of their visit in a timely manner and through a range of media.

Rationale

Information is vital to the growth of tourism, and it needs to be provided to tourists and tour operators at every point in the process from initial inquiries, through bookings, to the visit itself. Information not only makes potential visitors aware of Nyungwe, but also enhances their experience and satisfaction if it is delivered in accurate and appropriate ways. Ensuring the delivery of information, and ease of communication, is therefore a significant element in creating a professional and quality service.

Action points

- 7.1 Provide up to date information on trails (including maps) activities, prices and accommodation through as wide a network as possible (locally, in Kigali, on the website and distributed to tour operators).
- 7.2 Ensure that all guide and point-of-contact staff are at least bilingual in French and English.
- 7.3 Ensure a comprehensive and effective communication system (including fax and email) between Kigali and the three local centres (Gisakura, Uwinka and Kitabi).
- 7.4 Provide a central booking capacity in Kigali for accommodation.
- 7.5 Ensure any changes in information are communicated to operators and updated in communication media in a timely manner.

8. Education and interpretation

Increased environmental education and visitor satisfaction will be facilitated by provision of the highest quality of interpretation to visitors during their visit through a range of media and resources.

Rationale

Environmental education and interpretation is an overlooked aspect of the tourism product but one that can enhance visitor experience if targeted in the appropriate way using the appropriate tools. For most visitors, the simple opportunity to learn something about what they are seeing, presented in a creative manner, is sufficient without the need for complex and expensive technology. Kitabi offers a potential site for an interpretation centre but such a development should be clearly designed for, primarily, educational groups and domestic, resident families who are the most likely segments to utilise such a development in that particular location.

Action points

- 8.1 Establish the Kitabi complex as a centre for education, aimed primarily but not exclusively at children, families and educational groups.
- 8.2 Ensure that guide training incorporates best practice for interpretation.
- 8.3 Upgrade tree signs and other informational sign-boards to include English names.
- 8.4 Revise, update and reprint the Nyungwe forest guide booklet, and make available for sale locally and in Kigali.
- 8.5 Create posters, leaflets or interpretation boards for distribution at guesthouses and other outlets locally.
- 8.6 Explore the possibility of providing 'research-based' tourism, through illustrated talks to selected client groups by resident staff and researchers.

9. Monitoring and evaluation

An integrated monitoring system will be developed and maintained within ORTPN to provide the necessary and sufficient information for regular status reports, evaluation and adaptive management of tourism in accordance with the guiding principles of the strategy.

Rationale

As a strategy is implanted, it is vital to be able to measure its effectiveness, and evaluate its successes and failures, as this will enable continuous improvement and redirection where necessary in light of changing circumstances. For this to be achieved, a comprehensive monitoring and evaluation programme is essential. This should begin at the outset with market research to further test the validity of some of the specific recommendations in the strategy, and should incorporate regular opportunities for consumer feedback and progress review by the implementers of the strategy.

Action points

- 9.1 Undertake market research with different tourist segments within Rwanda to test some of the recommendations for product development within this strategy.
 - This to be undertaken by WCS project staff in April-June 2004 as part of a MSc research project.
 - The results to be used to amend/update the strategy where necessary.
- 9.2 Refine current data collection and analysis protocols for maximum efficiency, and maintain monthly reporting.
- 9.3 Undertake stratified visitor surveys periodically at all visitor centres (Gisakura, Uwinka and Kitabi) to obtain feedback from customers.
- 9.4 Convene round table/feedback meetings with community groups and tour operators at regular intervals (every 6-12 months) to obtain feedback from key partners and stakeholders.
- 9.5 Contract a consultant to undertake a mid-term review of the progress of this strategy, and amend where necessary.
- 9.6 Ensure that all monitoring is analysed, reported to and considered by the steering committee (see point 10.1 below) and acted upon in a timely manner.

10. Co-ordination and support

The interests and commitment of the various stakeholders in tourism will be harnessed through collaboration and shared responsibility to ensure the effective implementation of this strategy.

Rationale

Tourism in Nyungwe involves a range of stakeholders with different perspectives, needs, and skills/resources to bring to the table. Tourism development cannot be achieved by ORTPN in isolation, and this strategy was created through a participatory process with wide stakeholder consultation and review. If it is to succeed in practice, it requires the continued input of these specialist stakeholders throughout the process of implementation, to advise, assist, review and redirect where necessary.

Action points

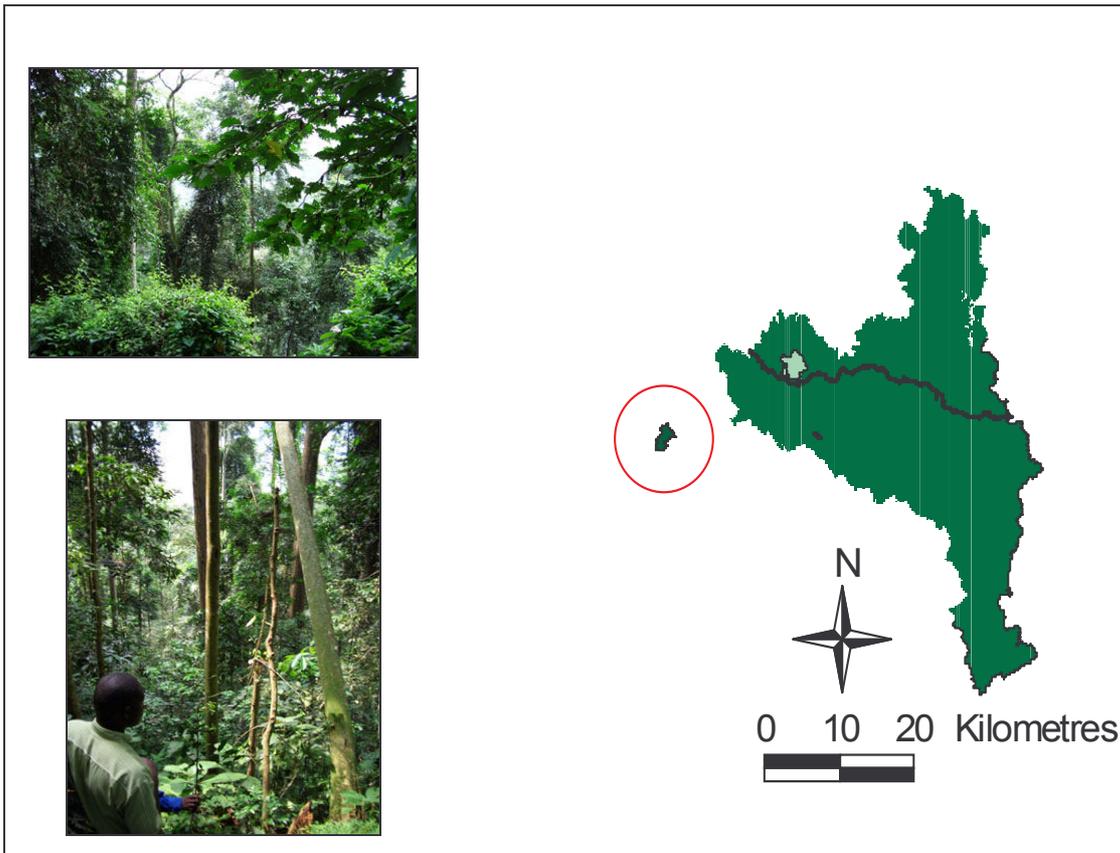
10.1 Establish a steering committee for tourism development within ORTPN, with representatives from park management, the private tourism sector, NGOs, donors and local community representatives:

- The committee to have clear terms of reference and be answerable to the Director General of ORTPN.
- The committee to meet twice per year to evaluate monitoring and progress towards strategic objectives, and refine the strategy where necessary according to prevailing circumstances.
- The committee to ensure the timely, transparent and accurate flow of information to operators, governments, the media and the public regarding tourism in Nyungwe.
- The committee to assess and address the needs, concerns and conflicts of various partners and stakeholders in a timely manner.
- The committee to act as a focal point for co-ordinating the development of external support networks, including funding, training and expert guidance from specialists in tourism development, education/interpretation provision, and community participation/rural development.

8. ACTION PLANS

1. Development of Cyamudongo forest for chimpanzee viewing

Cyamudongo forest lies less than 1.5 hours drive from Gisakura. It is located off the main tar road to Cyangugu, some 12 km along a dirt road through tea plantations and, closer to the forest, banana plantations (see map and photos). Access is therefore relatively easy by 4WD, and visitors could undertake a morning visit to view chimpanzees from accommodation at or near Gisakura, or from Cyangugu on Lake Kivu, which is of similar distance as Gisakura.



Cyamudongo forest is ecologically a little different from Nyungwe, perhaps as a result of climatic or latitudinal differences. There appear to be more butterflies, and a different selection of bird species, the very visible Ross's Touraco being much more common in Cyamudongo. These add additional attractions to the Chimpanzees. Currently, however, there are few trail networks and the chimpanzees are very wild and unhabituated.

Habituation of chimpanzees

Comparative chimpanzee viewing sites in Tanzania (e.g. Mahale mountains), and Uganda (e.g. Kibale forest, Budongo forest) have had a long history of research and habituation of chimps, which means that they are very accessible to tourists. In Cyamudongo, therefore, a sustained period of chimpanzee habituation will be required before a quality viewing experience can be guaranteed. This requires some effort, according to a chimpanzee specialist working in Budongo forest:

“A time-frame of 4 years habituation would be required before the chimps would sit still long enough for humans. This anticipates 4-6 people working most days for 6+ hours a day (from dawn, or just after). The more effort that is put in the faster the habituation will be - if the habituators/guides etc. only go looking for chimps if tourists are there, then the habituation may never happen. Also [it] depends on the contact with chimps - the chimps have to see the people, and realise that they aren't trying to hurt them, in order to get habituated.”

Infrastructure requirements

- The main requirement is for a network of well-maintained trails to facilitate chimpanzee viewing. They do not need a lot of infrastructure or interpretation materials, being primarily for access to the forest.
- During rains, parts of the access road become slippery, and so if demand increases there will be a need for some targeted upgrading and maintenance of the road using murrum.
- Local accommodation is less important at the outset given proximity to Gisakura and Cyangugu as described. In the longer term, a small scale camp or up-market lodge may provide an opportunity for local involvement and benefit.

Community involvement and benefit

- Primarily, employment for chimpanzee habituation and tracking that, as described, is relatively labour intensive.
- If and when tourism takes off at Cyamudongo, there will be opportunities for:
 - A small café or retail outlet at the nearby local centre to supply refreshments
 - Locally trained guides to coordinate tourist visits
 - Possibly, a community camp or hostel on a banana plantation with landscape views of the forest.

2. Development of a tea plantation tour

The tea estates (plantation and factory) that act as Nyungwe buffer zones offer tremendous potential as a tourism attraction. Not only are they picturesque and of environmental significance to forest protection, they provide an opportunity for complementary product development that enhances the educational and recreational value of a visit to Nyungwe.

This proposal is for a 1.5-2 hour packaged tour that would act as an optional, low-effort, afternoon activity for those clients who did not wish to undertake further forest walks. It could take place in association with the Gisakura tea estate and factory adjacent to the western entrance to Nyungwe and existing accommodation at Gisakura.



Tea estate buffer around Nyungwe



Tea picker



Tea factory



Sacks of freshly picked tea



Wilting trays



Grinding the leaves



Sorting the dried and fermented tea



Checking the different grades

The proposed afternoon tea tour

- Meet and greet at the entrance: brief prep talk.
- Visit plantation, watch and meet plantation workers (community members) picking tea.
- Visit factory:
 - Initial talk on the main stages of processing in the factory, prior to entry (as it is very noisy once inside)
 - Tour of the main stages in the process (see pictures)
 - Visit to the wood yard and furnace that drives the drying process
 - Visit to the tasting room and quality control lab
- A relaxing cup of Gisakura tea served on the veranda of a 'tea house' overlooking the plantations and forest
- An opportunity to purchase some Gisakura tea and other souvenirs at the tea house shop.

Infrastructure and other requirements

- A formal arrangement would need to be made with the owners of the factory and plantation to enable the tour to take place. Currently the factory is under government ownership but is soon to be privatised. Thus, it is important that ORTPN investigate the implications of this change immediately.
- As a working factory with heavy machinery, there are health and safety implications for tourist access. Any tour would have to be arranged so as to minimise the risk of injury to visitors. The provision of safety equipment (hard hats) to visitors would be important, as would facilities to ensure safe access and minimum distance controls in areas of potential risk.
- The current informal guide is very knowledgeable but would require English language training.
- An illustrated information leaflet (in English and French) should be produced in association with the factory to guide and inform visitors.
- A tea house with veranda and shop would need to be constructed.
- The tour, once agreed and developed, should be promoted through all the usual media channels, including the website, and operators should be given a guided promotional tour.

Community involvement and benefit

- The tour would attract a fee of, perhaps, US\$ 5-7 per person, that could be used (in part or whole) as an employee fund for community projects. Given that the plantations supplying the Gisakura factory are in part a community co-operative, tour fee revenues could be channelled through this co-operative to assist appropriate community associations and development projects.
- The retail outlet associated with the tea house could provide an opportunity for the sale of souvenirs and other items produced by community associations. These could include:
 - Gisakura tea packaged and labelled locally.
 - Nyungwe honey produced and packaged locally.
 - Related handicrafts produced locally.

3. Development of Kitabi complex for tourism

The Kitabi complex (see diagram) will be redeveloped as a park headquarters, but provides some opportunity for the development of educational tourism, targeting primarily domestic and resident families and school/training groups (including ORTPN trainees from elsewhere).



Kitabi housing with potential for self-catering tourism



Kitabi buffer and forest view



Office complex with potential for education and handicrafts centre

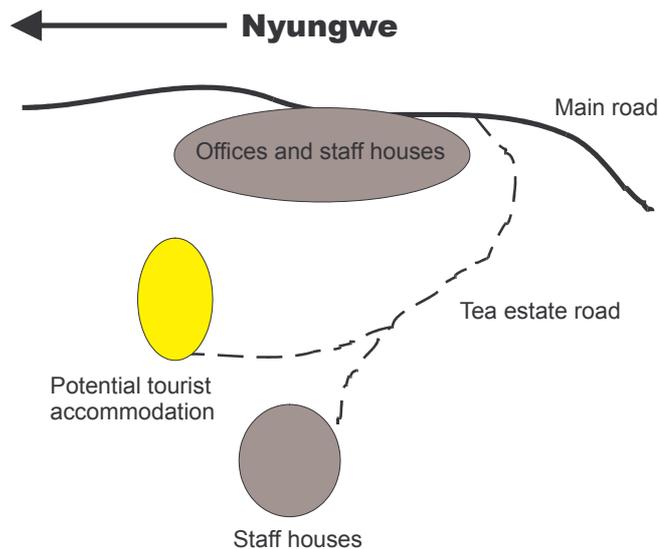


Diagram of Kitabi complex showing distinct three areas of infrastructure

Infrastructure development and other requirements

- The small group of houses isolated from the main complex and at distance from the main road (see diagram and pictures) should be renovated as self-catering or dormitory accommodation for families and small groups – furniture, power, water and cooking facilities will be required.
- Provision should be made for mass catering for school groups or their equivalent that may not be able to self-cater.
- The large, tri-partite block at the entrance to the Kitabi site should be developed as a training and education centre. The three parts of this block could be developed as:
 - An information room: maps, background information, library, shop
 - An interactive room: low tech, but designed for 'hands-on' learning and interpretation.
 - A demonstration room: combining handicraft workshop with classroom space as necessary.
- Hardened trails through the tea plantation and buffer zone into the forest, designed with sufficient signage and interpretation boards for self-guiding as well as guided tours. These would be designed and managed for greater use than the Uwinka trails, in anticipation of larger groups and more frequent visitation, including day-trippers from Butare.
- Location and habituation of resident primates, especially colobus troop known to reside close to Kitabi. This would in part determine the location of trails.

Sample educational itinerary (2 nights)

- **Day 1:** arrive for lunch; afternoon - environmental learning and activities in interpretation centre.
- **Day 2:** morning - forest trail walk; afternoon – handicraft demonstration and activities in interpretation centre.
- **Day 3:** morning – forest trail walk or other physical activity; afternoon – depart.

Partnerships and consultation requirements

- Contract an interpretation specialist to design and outfit the interpretation centre, and the trail network with interpretation materials.
- Contract a private management company to operate the accommodation and service provision for visitors to Kitabi.
- Develop linkages with the Ministry of Education to support Kitabi/Nyungwe as a core environmental education activity, through its inclusion in relevant curricula and with the provision of transport and other subsidisation for group visits.
- Develop linkages with GTZ and other partners involved in supporting the development of community handicraft associations in Gikongoro Province.

Community involvement and benefit

- The interpretation centre would include facility for a handicraft 'centre' and demonstration workshop, managed and staffed by appropriate community associations. An associated retail outlet would provide potential for sale of produce to visitors.
- The construction and maintenance of trails would provide local employment.
- The management contract for the accommodation and visitor services should include provision for maximum local employment and training opportunities, and maximum linkages with the local agricultural economy in terms of the supply of foodstuffs.

4. Development of a canopy watchtower or walkway

In a forest such as Nyungwe, where views over the forest and its canopy are made possible from the ground by the nature of the steeply ridged terrain, the additional benefits of a canopy tower or walkway (see pictures) may be difficult to discern. However, the ability to climb into the canopy and experience the richness of its structure and living diversity is an added attraction that could serve to generate significant publicity and additional visitation.



Canopy view from tower



Canopy tower



Canopy walkway

There is currently no canopy walkway in East Africa, the nearest being in Ghana, although one is being developed in Madagascar and the idea is under consideration in Uganda. The Ghanaian example served to dramatically increase visitation to Kakum National Park, in particular amongst Ghanaian citizens. Thus it may be a useful tool for domestic tourism in particular, perhaps associated with the Kitabi complex and situated in the eastern side of the forest, where it will have less environmental impact and facilitate easier access by greater numbers of day visitors. It should be noted, however, that such a development does not facilitate primate viewing very easily, as primates are often displaced by such a development.

Consultation with the Global Canopy Programme, an NGO specialising in the development of canopy towers and walkways for research and tourism, based in Oxford, UK, revealed the potential benefits, costs and constraints of such an initiative. This is clearly a longer-term prospect that requires considerable research and consultation, not to mention considerable financial resources and maintenance costs, and it may not be appropriate for Nyungwe.

If it is to be considered, the following activities constitute the necessary preparation:

- Undertake a scoping visit to Kakum National Park in Ghana to see first hand the implications of such a development.
- Invite the Global Canopy Programme to send a representative to evaluate the feasibility of establishing a free-standing canopy tower in Nyungwe, and produce a cost-benefit analysis.

5. Development of Lake Kivu Attractions

Lake Kivu is currently an untapped tourism resource but offers great potential for complementary product development as well as the recognised role as a transport link in a circuit between Nyungwe and PNV. Local activities are more likely to appeal to independent and resident tourists, rather than upmarket package tourists, although these may also be catered for.



Local fishing boats on Lake Kivu



Sunset boating on the Lake



An example of a tourism charter boat from Indonesia



A example of a larger 'cruise' ship that could be used for lake transport.

Potential local attractions and activities

- An afternoon 'sundowner' cruise on the lake, beginning in Cyangugu or more preferably Nyamasheke (see Fig 3.).
- Fishing trips by boat.
- Visits by boat to offshore islands in Lake Kivu, either as a short tour or for an overnight camping trip.
- Transport by boat to and from Kumbye mission retreat on the Gatare shore of the lake for overnight stays for relaxation and bird watching.

Partnerships and consultation requirements

- Lobby government to accelerate development of suitable public or private transport linkages with Kibuye and Gisenyi to facilitate the 'primate discovery tour'.
- Develop institutional and communication linkages with Kumbye mission retreat as an alternative local accommodation provider for appropriate groups.
- Assist the Lake Kivu fishing co-operative or alternative community group to establish small scale local boat tours of the appropriate standard and level of safety for visitors.

Community involvement and benefit

- Provision of boat trips.
- The development of a community-run campsite or hostel on an island (or a secluded mainland 'beach'), for backpackers and independent tourists to use.

9. TIMETABLE OF PRIORITIES

The elements of this plan should be considered to extend over a five-six year period to 2009/2010. Within this period, certain actions are of greater priority than others. Priority is assigned on the basis of imminent need, resource availability and strategic importance. Priority is assigned to four categories:

- **Immediate:** preparatory activities that should be undertaken within 6-12 months to lay the foundations for implementation of the plan.
- **Short term:** priority action points that should be initiated immediately and be achievable within 1-2 years.
- **Medium-term:** lower strategic priority, requiring more resources or the implementation of short-term activities first. Achievable within 2-3 years.
- **Longer-term:** important for sustained growth and diversification but requiring additional expertise and financial resources, and dependent on additional externalities (market, security, etc.). If deemed feasible and appropriate, will be achievable within 4-5 years.

Immediate priorities

- Establish a Nyungwe tourism steering committee of representative stakeholders.
- Undertake a market survey with different tourist segments in Rwanda (WCS to undertake in April-June 2004).
- Undertake study trips to comparative destinations (Tanzania/Uganda for chimp tourism, Ghana for forest walkways and domestic tourism, Sri Lanka for upland forest and tea plantation tourism).
- Invite appropriate external technical and commercial specialists to visit Nyungwe (ecotourism, education, canopy tower).

Short-term priorities

- Renovate/upgrade existing trail network at or near Uwinka and Gisakura.
- Improve communication and information dissemination.
- Accelerate Cyamudongo chimp habituation, develop trails.
- Establish a tea estate/factory tour.
- Develop a hospitality/language training programme.
- Establish a mid-range 'plantation house' accommodation on western side, under private management, suitable for most mid-range Ecotourists.
- Identify and develop local co-operatives for products/handicrafts, and establish retail outlets and linkages with the accommodation sector.
- Identify appropriate public-private partnerships for tourism investment and development

Medium-term priorities

- Establish lower-end self-catering and educational tourism centre at Kitabi, with trails etc.
- Renovate Cyamudongo access road through tea estate.
- Establish boat transport on Lake Kivu ('sundowner' trips, island visits and larger scale transport linkages to Kibuye and Gisenyi).
- Establish a 'community-camp' associated with Cyamudongo/Lake Kivu or Nyungwe.
- Develop longer trails and access to the 'source of the Nile' in northern Nyungwe, with community involvement (guides or camping/accommodation).

- Phase out Gisakura guesthouse.

Longer-term priorities

- Develop an exclusive tree-lodge or equivalent in an appropriate location in Nyungwe or Cyamudongo (contingent upon market and private investor, as well as primate habituation). Further market analysis and feasibility work needs to be undertaken in the shorter term.
- Construct a canopy tower (contingent on market, financing and technical feasibility).
- Develop and market viewing of Owl-faced monkeys in southern bamboo forest (contingent upon habituation, security and access).

ANNEX 1. TERMS OF REFERENCE AND METHODOLOGY

Terms of Reference

A suitably qualified consultant is required to assist in the process of preparing a tourism development plan in a participatory manner, involving a wide variety of stakeholders from the private sector, local communities, NGO and government organisations. As part of the PCFN-ORTPN park management plan for Nyungwe forest National Park.

Specific Outputs/Activities

- Stakeholder participatory workshop/s to develop strategy and actions for tourism development
- Identification of tourism circuits within and outside the Nyungwe Forest bearing in mind both regional aspects (proximity to the Lake Kivu and genocide site) and national considerations
- Product (Facility & activities) development for tourism in the Nyungwe forest to enhance tourist experience, diversification and product connectivity;
- Destination marketing and branding for the Nyungwe Forest including strategies for selling the area as a stand-alone visitation site as is the case with Maasai Mara and other sites that have benefited from destination branding but not for mass tourism;
- Establish planning and management guidelines for environmental, business and community management and involvement
- Identify and recommend policy issues for tourism development in the Nyungwe Forest
- Develop a work schedule for implementing agreed activities
- Develop recommendations to minimize on potential conflicts between neighbouring communities, private sector and government agencies
- Preparation of final plan and supporting documentation
- Presentation of plan to stakeholders

Methodology

The approach to the exercise incorporated the following phases:

- Preparation
- Research and consultation
- Participatory planning
- Review
- Finalisation

The approach to the exercise embodied the following principles:

- **Ensuring asset preservation** by fully integrating the environmental management and protection requirements of the ecosystem within the planning process. Protected areas such as Nyungwe represent a natural asset of global significance. Preservation and sustainable utilisation of this asset are the foundations upon which tourism development and poverty alleviation rest. The consultant will identify integrated solutions for asset preservation through diversified tourism development in Nyungwe. This will be achieved by engaging with the government and NGO research and management community to ensure full representation within the final product.
- **Working with, and empowering, local people** and local government to create additional livelihood opportunities. As the custodians of much of the region, local communities

require assistance in developing the strategies and capacity to capture the benefits of tourism for asset preservation and poverty alleviation. Participatory planning is at the very heart of the approach to this project. Sustainability can only be achieved when the local people see the product being developed with them rather than for them and local and regional government work within these parameters. The consultant will incorporate local decision-making through a process of participatory planning that places communities at the core of the planning process.

- **Engaging the private sector.** As a commercial product, tourism requires the expertise of the private sector in all stages of development, marketing and management. Protected area authorities, NGOs and communities rarely have the skills or resources necessary to plan and succeed in a tourism venture without this input. The most successful wildlife and community-based tourism initiatives elsewhere have relied heavily on private sector input to the planning process, and on private sector operational partnerships. The consultant will work closely with the private sector during the market research phase, and involve the private sector in the participatory planning process.
- **Facilitating national development links** – the project will interface directly with prevailing development policy, especially that of the ORTPN. It will be a critical element that products are developed in tandem with the national marketing strategy and implementation plan developed by 'OTF', and in that way provide the ORTPN and its partners with a seamless transfer of new product.

ANNEX 2. DOCUMENT, POLICY AND INSTITUTIONAL REVIEW

Policy Review

Summary of Policy Context

- At the national level, tourism is viewed primarily as a means of generating foreign exchange earnings to meet development goals. Policy is geared towards increasing growth in high spending international 'ecotourism' markets, based on national parks and other environmental assets.
- The Vision for Rwanda's tourism industry is to
'Generate \$100 million in tourism receipts in 2010 by focusing on creating high value and low environmental impact experiences for Eco-travellers, Explorers and Individual Business Travellers.'
- Nyungwe National Park is viewed as the principal natural attraction to diversify the ecotourism product beyond mountain gorillas, to create an ecotourism circuit within Rwanda, and thereby to increase visitor length of stay and expenditure in the country.

National Tourism Policy

At a national level, tourism is viewed as a key component of Rwanda's 2020 Vision for economic growth, development and poverty alleviation. At current population projections, this will require a seven-fold increase in GDP by 2020 to increase per capita income to \$900 from its current level of ~\$250 (OTF, 2003a). Tourism is one of five sectors (alongside agriculture, livestock, manufacturing, energy and telecommunications, and public services) for which the government is actively seeking international investment to facilitate growth (GoR, 2003).

Within government, tourism falls under the Ministry of Commerce, Industry, Investment, Promotion, Tourism and Cooperatives (MINICOM). The government's policy on tourism has three principle objectives (GoR, 2003):

- Encourage [the diversification of] ecotourism development based on the natural beauty [and culture] of the country [beyond the mountain gorillas].
- Ensure that the development of the tourism sector leads to equitable distribution of income to the whole country.
- Ensure that the tourism sector contributes to the creation of a strong and positive image about Rwanda.

National Tourism Development Strategy

In 2002, a UNDP/World Tourism Organisation strategy for tourism development in Rwanda was produced. It is clear from this, and other documentary evidence and interviews, that national parks and other natural attractions are considered the foundation upon which tourism development in Rwanda will take place. The strategy identified a number of underlying needs that require attention for tourism development to succeed, including tourism legislation (currently in preparation), human resource and infrastructure development, institutional strengthening, financial investment, and marketing. In relation to the development of tourism itself, the strategy identified the following principal objectives:

- Diversify ecotourism products.
- Increase visitor length of stay in the region of PNV.

- Ensure the continued survival of PNA (through buffer zone developments).
- Upgrade tourism development of Nyungwe (through linkages with Lake Kivu).
- Develop the shore of Lake Kivu for tourism.
- Create cultural and handicraft products.

The plan recognised the importance of Nyungwe as an international attraction, and a means to diversify Rwanda's ecotourism product and extend visitor length of stay in the country. It also identified the districts (in Cyangugu and Gikongoro Provinces) bordering Nyungwe as priority areas for tourism development as a means of ensuring the participation of the local population. It predicted a carrying capacity of 50,000 visitors per annum (UNDP/WTO, 2002).

In 2003, a subsequent marketing and promotion strategy was launched by 'On The Frontier Group' (OTF), an international management consultancy company contracted by the Office of the President. Cognizant of national development goals, OTF created a vision of dramatic tourism growth to generate annual receipts totalling \$98 million by 2010. This would be achieved by:

- Increasing international arrivals from 8,000 (in 2001) to 70,000 (an average annual growth rate of 25%).
- Increasing mean length of stay to 7 days.
- Increasing mean spend per day to \$200, thereby increasing mean spend per visitor from \$500 to \$1,400 (comparable with the most expensive destination in the region - Tanzania = \$1,610, Uganda = \$1,049, Kenya = \$322).

Some 34% of this volume (24,500 visitors) is envisaged to consist of 'eco-travellers', focusing on national parks and wildlife. With an above-average estimated daily spend of \$320 over a seven day visit, the eco-traveller segment would provide 56% of projected receipts (OTF, 2003a).

OTF defines eco-travellers as seasoned, informed, nature-based travellers looking for unique natural experiences and attractions. They require safety, comfort, intimacy, education and interpretation, all within a culturally and ecologically sensitive framework. In order to capture this market segment and achieve the goals identified above, OTF have proposed the development of a 'Primate Discovery Tour' that would operate as a circuit encompassing Nyungwe, Lake Kivu and PNV (OTF, 2003b, and see Fig 3.).

National Tourism Development Strategy in Relation to Nyungwe

The proposed Primate Discovery Tour that forms the basis of national strategy regarding ecotourism development recognises that the 13 species of primates in Nyungwe (including chimpanzees) represent a major complementary product to the mountain gorillas of PNV. Thus, the proposed tour is based upon these two major hubs, with Lake Kivu offering a geographical link in the circuit and an opportunity for additional recreational and leisure activities.

The gorillas of PNV are already well known internationally and are the single most important reason for tourists to visit Rwanda. Yet such visitors spend very little time in Rwanda. Most organised tours are only a few days in duration. Moreover, a significant number of gorilla tracking tourists undertake a day trip across the land border with Uganda, and do not stay overnight at all. Under these circumstances it is clear that, at the national level, Nyungwe is viewed as the key to diversifying tourist attractions and extending visitors' stay in Rwanda.

The envisaged scenario of an eight day tour would see visitors travel to Nyungwe from Kigali, spending 2-3 nights at a lodge locally, and undertaking various wildlife viewing treks in the forest. From there visitors would continue via Lake Kivu to Ruhengeri to view gorillas. To facilitate such a tour, the tourism infrastructure in Nyungwe would require attention. Besides enhancement of existing facilities, the following additional development was proposed:

- The development of accommodation to a capacity of 150 beds in Nyungwe, at a projected cost of \$1.5 million to an investor. A potential site at Uwansenkoko towards the eastern boundary of the forest was identified for this development. It is adjacent to the main road through the forest, on the disused site of a Chinese road construction camp. An additional site further west, also adjacent to the road and comprising a disused military camp, has also been under consideration as a potential lodge site.
- The development of 20kms of new trails in the Uwansenkoko area for the use of visitors staying at the lodge.
- The renovation of the Kitabi complex of houses at the eastern entrance to Nyungwe to form a park headquarters, visitor centre, museum, handicraft village and additional (temporary?) visitor accommodation.

Institutional Profiles of key stakeholders

ORTPN

Created in 1974, The Rwandan Office for Tourism and National Parks (ORTPN) was originally charged with managing protected areas, promoting tourism, and operating government owned hotels. Over the following decades its field conservation activities, and the development of gorilla tourism, were relatively successful, and it gained the support of government and NGOs. However, it suffered from a diverse remit with no clear mission, institutional weaknesses in planning, coordination, administration and funding, and a lack of attention to tourism promotion.

As a result, in 2002, a restructuring process was initiated. It has now been divided into two separate technical agencies, the Conservation Agency and the Tourism Agency, each headed by an executive director, and both falling under the coordination of the Director General of ORTPN. The role of the Conservation Agency is self-explanatory. That of the Tourism agency is to maximise the profitability of tourism for all Rwandans through the:

- Development of a unique Rwandan Tourism Product including both natural and cultural attractions;
- Facilitation of the creation, marketing and distribution of educational and high quality experiences to targeted tourism customers;
- Enhancement of sustainable and environmentally sensitive growth.

Thus, ORTPN is responsible for both the conservation and sustainable utilisation of Rwanda's national parks. It employs field staff answerable to local wardens in each park, and administrative and support staff in a national headquarters in Kigali. ORTPN is currently funded by tourism receipts (principally gorilla tracking permits) and donor support. There is an unwritten agenda to increase tourism revenues to ORTPN in order to offset a greater proportion of its operating costs. Equally, there has been talk of implementing tourism revenue-sharing schemes with local communities surrounding parks. Such initiatives would also have to be funded from tourism income from parks.

WCS

The Wildlife Conservation Society (WCS) is an international non-governmental organization based in the US. Its mission is to *'save wildlife and wildlands by understanding and resolving critical problems that threaten key species and large wild ecosystems around the world'*. WCS has worked in Africa since 1920, and in Rwanda since 1959 when it supported the first mountain gorilla surveys in the Virunga Volcanoes. Subsequent WCS-funded gorilla research in the 1970's led to the establishment of mountain gorilla tourism as a means of generating conservation revenue.

WCS has been supporting the conservation and management of the Nyungwe forest, in collaboration with ORTPN, since 1987, through the Project Conservation de la Forêt de Nyungwe (PCFN). Initial activities focused on primate research and infrastructure development. Since 1994, principal activities have included rebuilding the infrastructure associated with conservation in Nyungwe, assisting ORTPN with protection and law enforcement, undertaking forest research and monitoring, building human and institutional capacity regarding research and conservation, and undertaking community-based conservation and awareness-raising activities around the forest.

Since the early 1990s, WCS through its PCFN project has promoted tourism to Nyungwe, through the provision of facilities and training of ORTPN guides. It currently operates a guesthouse close to the western entrance of the forest, which is the principal overnight accommodation for visitors to Nyungwe.

Within its five-year strategic plan for 2002-2006, WCS-Rwanda stated its mission *'to resolve critical problems facing the conservation of endemic and threatened species in Rwanda through research, training and adaptive management.'* Its current annual work plan includes a set of ecotourism development objectives:

- To improve and disseminate a high quality tourism information
- To improve visitor orientation and interpretation services and facilities
- To diversify and expand environmentally friendly tourism activities, products and facilities in the Nyungwe Forest.
- To increase community participation and private sector involvement in tourism development and management.

Within the first of these objectives it envisages a 10% increase in tourism visitation to be an indicator of success.

Volcanoes Safaris

Volcanoes Safaris is a commercial tour operator and ground handler based in Uganda and Rwanda, with a sales and marketing office in London. It specialises in small-scale, upmarket ecotourism tours based on mountain gorillas and other wildlife attractions in the region. Its target markets are Western Europe and the USA, as well as tourists from the East African region. Volcanoes Safaris promotes itself as a responsible tour operator. It has built two eco-friendly camps close to national parks in SW Uganda and is in the process of constructing a similar development near PNV in Rwanda.

In partnership with WCS and ORTPN, Volcanoes Safaris obtained a 'Business Linkages Challenge Fund' grant from the Department of International Development (DFID) of the British Government. This funding, for a project entitled 'Rwanda – Harnessing the benefits of tourism for local communities', is intended *'to develop sustainable tourism businesses that are responsive to the needs of the poor and the environment, create opportunities and facilitate their development'*.

The project seeks to develop ecotourism ventures in a pro-poor and socially responsible manner through the cooperation of the private sector, communities and NGOs. Its focus is on PNV and Nyungwe, viewing the latter as a significant and untapped resource for tourism and envisaging a range of product enhancement and community enterprise activities. The first stage of the project with regard to Nyungwe is the development of an action plan, for which this document is the result.

ANNEX 3. SITUATION ANALYSIS OF NYUNGWE TOURISM

Market analysis

Tourism trends in Rwandan National Parks

Prior to the war, in 1989, Rwandan parks received over 23,000 visitors. Between 1990 and 2000 numbers remained below 5000, but have begun to recover strongly and numbered over 16,000 in 2003. These were split almost equally between PNV (44%) and Akagera (45%), whilst Nyungwe only accounted for 11% of park visitors (Fig 4.).

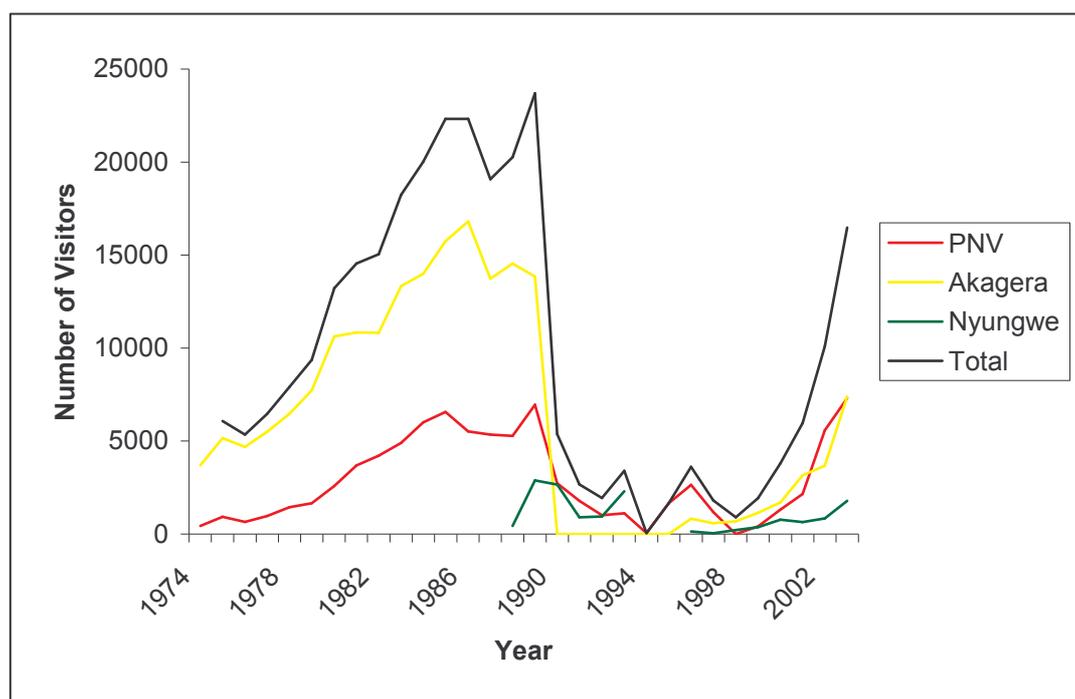


Fig 4. Visitor numbers to Rwandan parks, 1974-2003 (Source: ORTPN).

In 2003, 64% of park visitors were foreign, but there were large differences between parks, with foreign visitors accounting for 90% of PNV visitors, 78% of Nyungwe visitors, and 36% of Akagera visitors.

Tourism trends in Nyungwe

Tourism in Nyungwe has been increasing since the late 1990s, and dramatically so between 2002 and 2003, when 1785 visitors were recorded. Of these, 78% were foreign (split 50:50 between residents and non-residents), and 22% were nationals (Fig 5.). All three groups have displayed consistent growth, the highest being among non-residents, followed by nationals, followed by residents.

Over the past nine years, there has been no systematic trend in the proportion of national to foreign visitors to Nyungwe. However, among foreign visitors, the proportion of residents has fallen whilst the proportion of non-residents has risen (Fig 6.).

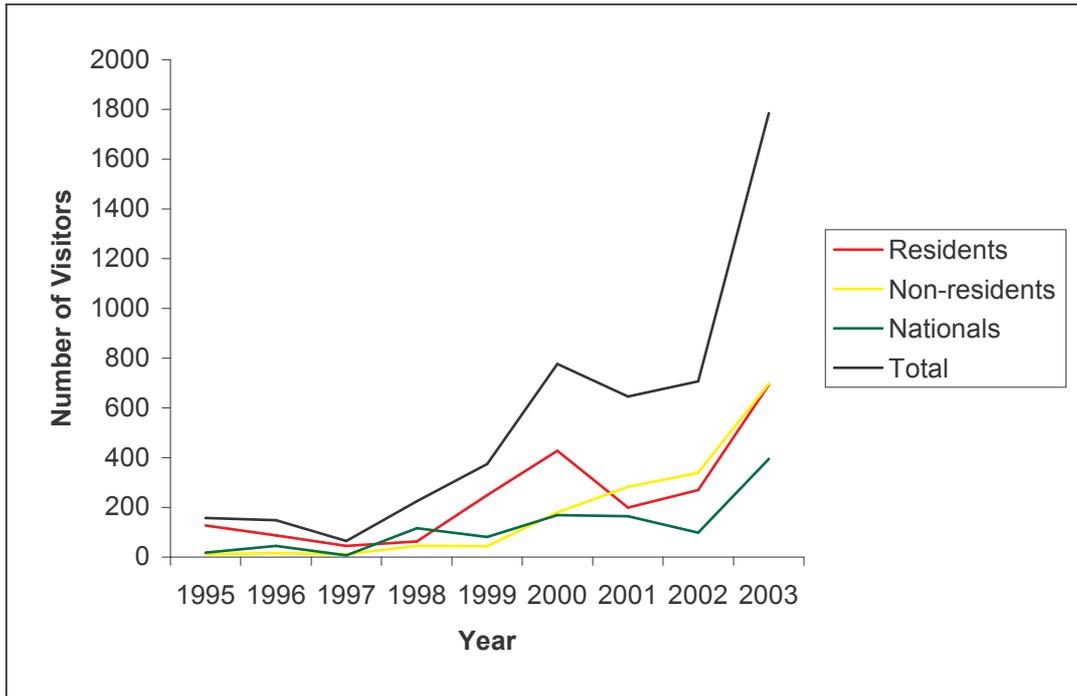


Fig 5. Numbers of different visitors to Nyungwe, 1995-2003 (Source: PCFN).

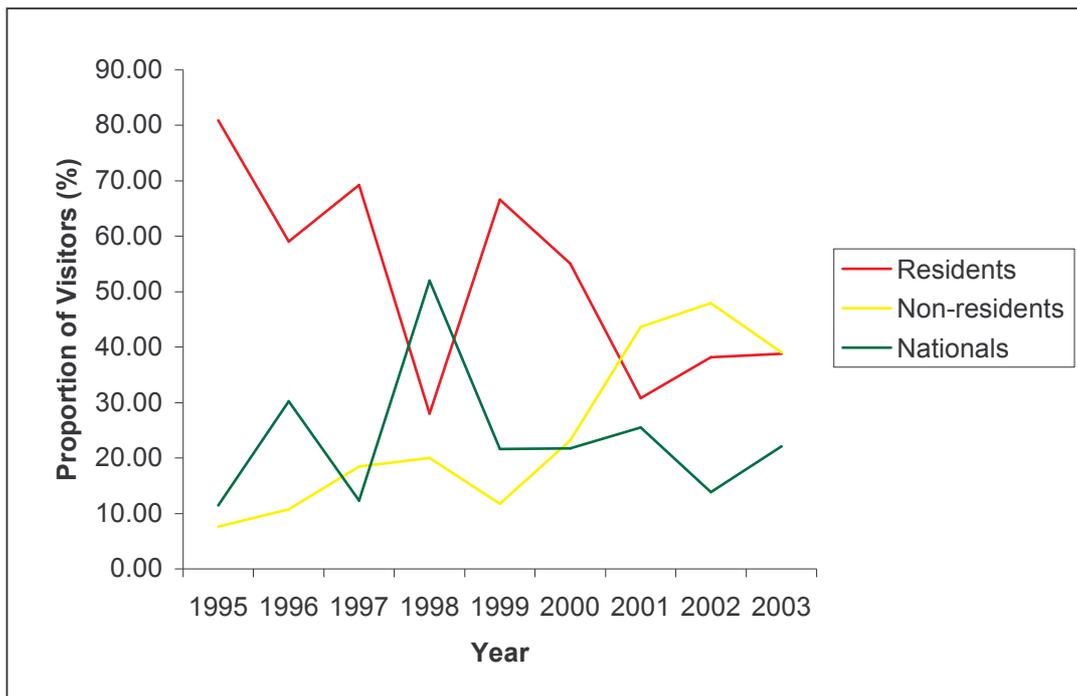


Fig 6. Proportions of different visitors to Nyungwe, 1995-2003 (Source: PCFN).

There is some seasonality to Nyungwe visitation, with 28.3% of visitors arriving in July and August (Fig 7.)

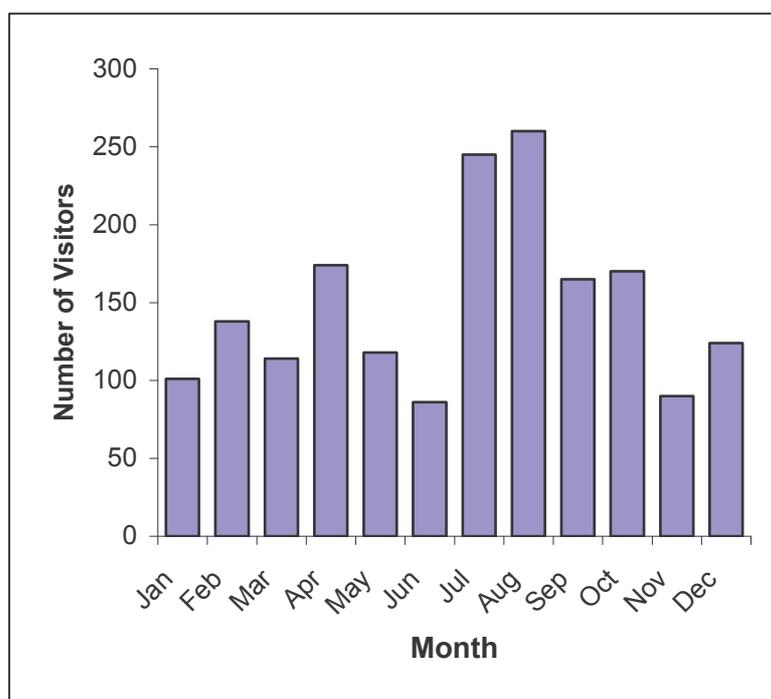


Fig 7. Monthly arrivals to Nyungwe, 2003 (Source: PCFN).

In 2003, a total of 40 foreign nationalities were represented among Nyungwe visitors. The most common were British (15.5%), American (14.9%), German (14.1%) and Belgian (12.2%). French visitors accounted for 7.2% of visitors, whilst South Africans accounted for only 1.9% of visitors. Over two thirds of all foreign visitors were European (Table 1).

Nationality	Visitors	Proportion (%)
British	216	15.5
American	207	14.9
German	182	13.1
Belgian	170	12.2
French	100	7.2
Italian	69	5.0
Canadian	67	4.8
Dutch	55	4.0
South African	26	1.9
Australian	21	1.5
Total Europe	983	70.7
Total US/Canada	274	19.7
Total Africa	77	5.5
Total other	56	4.0
Total	1390	100.0

Table 1. Nationalities of foreign visitors to Nyungwe, 2003 (Source: PCFN).

Existing tourism segments in Nyungwe

Nationals (Rwandan citizens): most of those visiting Nyungwe are students conducting research in the forest. Others are government or NGO representatives visiting Nyungwe on business.

Residents (Expatriates): These are foreign professionals living and working in Rwanda (mainly Kigali, but also Butare) for extended periods. By far the largest proportion comprises NGO employees, followed by UN and international development agencies, and foreign embassy staff (Source: PCFN visitor registration book).

Non-residents (International visitors): This is a relatively diverse group, comprising the following:

- Relatives and friends of expatriate residents: visiting and hosted and guided around Rwanda by residents, using their own transport. Content to camp or use simple guesthouse accommodation. Unless they are repeat visitors, many will also visit the mountain gorillas.
- Independent pioneer or explorer tourists: usually travelling by public transport, with the more affluent or larger groups independently hiring a vehicle (with or without a driver guide). These are usually younger visitors (20s and 30s), often categorised as backpackers. Some are visiting multiple destinations in the region and may be travelling overland from, e.g., Uganda. The less affluent may not visit the mountain gorillas, but many will.
- Package tourists: Ecotourists and special interest tourists visiting Nyungwe on an organised tour arranged through an overseas travel agent and operated by a national or regional (often Ugandan) ground handler. More affluent and higher spending, often older, and almost all will also visit the mountain gorillas.

Evaluation of potential tourism segments in Nyungwe

There are a number of assumptions and requirements necessary to achieve the OTF vision of rapid growth in the high spending international eco-traveller market that are beyond the remit of a Nyungwe tourism development strategy. These include an estimated \$100 million in investment in infrastructure and capacity, increased direct international air linkages, the development of a domestic tourism culture and service industry, improved regional political stability, and an improved international perception of Rwanda as a safe tourism destination with quality attractions. Delays in fulfilling these requirements or meeting these assumptions are inevitable, and meeting the OTF goals is highly unlikely. This suggests that this market segment should not form the sole basis of the Nyungwe strategy, and particularly not in the short term.

Target Segments

Based on the analysis above, it will be important to continue to target existing market segments (particularly independent overseas visitors and residents), whilst offering the potential for growth in additional market segments:

- Domestic (Rwandan) visitors/educational and training groups
- Higher-end international package tour visitors

Tourism product and service audit

Inventory of current tourist attractions and activities

Currently, tourism in Nyungwe is based around two centres, Gisakura to the west of the forest, and Uwinka in the north central part of the forest (Fig 8.). The following are the principal attractions in and around Nyungwe that are currently exploited:

- 13 species of primates
- Chimpanzees
- Ruwenzori colobus monkeys (some in very large groups in the forest)
- Birds (over 250 species, including 26 Albertine rift endemics)
- Montane tropical rainforest
- Flowers (especially orchids)
- Kamiranzovu marsh

- Mount Bigugu (the highest peak in Nyungwe)
- Waterfalls
- Scenery (inside and outside the forest)

Current activities offered to visitors in and around Nyungwe focus on guided walking on established trails to view wildlife and scenery. These include the following (Fig 9.):

- Seven colour-coded trails, originating in or near Uwinka station, of varying distance and difficulty.
- A circular trail to Kamiranzovu marsh, originating on the tar road through the forest.
- A trail to the summit of Mt. Bigugu, originating on the tar road through the forest.
- A waterfall trail, originating at Gisakura station and passing through tea plantations before entering the forest.

Besides these guided trails, visitors may also go on specific primate tracking walks. These are based on the established trail networks but may also involve some off-trail walking. They include:

- Tracking chimpanzees from a 'chimpanzee trail' near Uwinka station.
- Tracking other primates in the region of Uwinka (colobus, blue monkeys and grey-cheeked mangabeys)
- A visit to a remnant forest patch on the Gisakura tea estate (close to Gisakura station), to view a habituated group of colobus monkeys.

Apart from the colobus at the remnant patch of forest on the Gisakura tea estate, there is no guarantee of seeing primates in the forest due to limited habituation and the movement of troops over large areas in search of food.

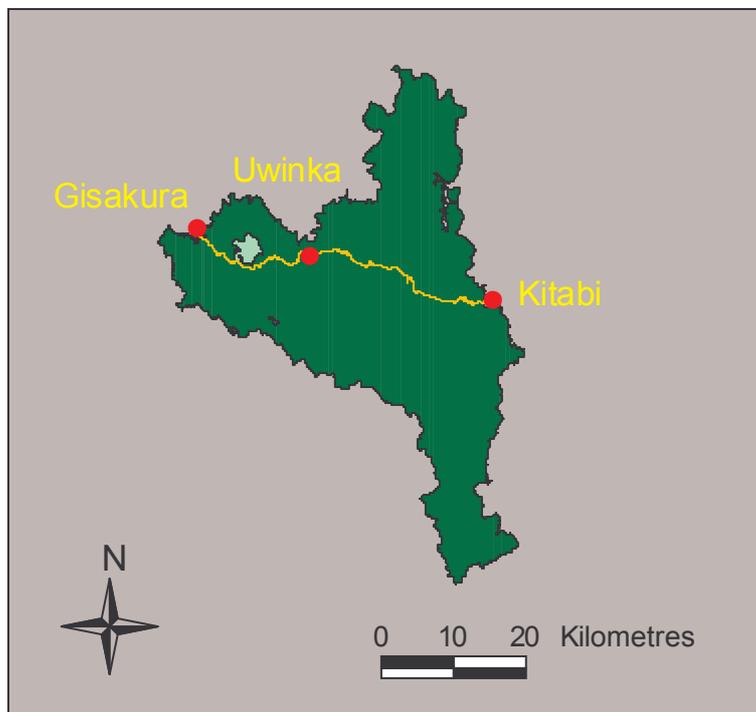


Fig 8. Main road and tourist centres in Nyungwe.

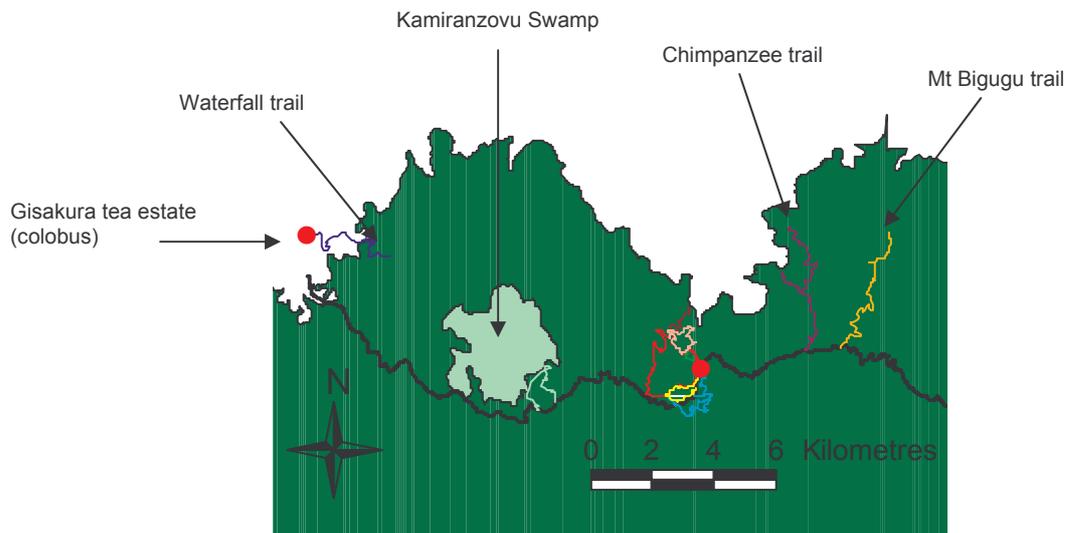


Fig 9. Location of coloured trails and other attractions.



Colobus in Gisakura



Kamiranzovu swamp



Waterfall



Primate tracking on forest trail

Use of current tourist attractions and activities

A total of 1775 tickets were sold for the above activities, suggesting that, on average, each visitor undertakes one activity (Table 2). The most popular activity was colobus viewing (primarily in the forest fragment on the Gisakura tea estate), which accounted for 22.9% of activities. This was followed by the moderately difficult pink trail (14.9%) the waterfall trail from Gisakura station (12.6%), and chimpanzee viewing (11.1%). All activities are relatively under-utilised, with an average of less than one visitor per day throughout the year undertaking any particular activity. It is rare for more than one group of visitors to undertake a particular activity on any particular day, mainly because most activities are undertaken in the morning.

Among the different nationalities visiting Nyungwe there were some significant differences in activities undertaken. For example, Americans were much more interested in viewing primates (especially chimpanzees) than walking trails. The same was true to a lesser extent of British visitors, who in addition were more likely to undertake bird-viewing activities. Conversely, Belgians (and Rwandans) were more likely to walk trails than track primates. German visitors were more likely to spend time on activities inside the forest than outside.

Tourist encounters by the consultant at Gisakura supported these data; American visitors stated that chimpanzee viewing was their primary reason for visiting Nyungwe, the only British visitor encountered was a bird watcher, and the only German encountered was principally interested in the forest rather than its wildlife.

Activity	Total	%
Colobes	407	22.9
Piste rose	264	14.9
Piste chute	224	12.6
Chimpanzés	197	11.1
Piste grise	176	9.9
Piste verte	162	9.1
Piste rouge	93	5.2
Singes argentés	85	4.8
Piste M Kamiranzovu	45	2.5
Oiseaux	30	1.7
Piste Bigugu	28	1.6
Piste jaune	23	1.3
Piste bleu	21	1.2
Mangabey	10	0.6
Régénération	8	0.5
Orchidées	2	0.1
Total des visiteurs	1775	100.0

Table 2. Visitors using each activity in 2003 (Source: PCFN).

Assessment of current tourist attractions and activities

Visitor comments in the registration book at Gisakura provided a good indication of levels of satisfaction (Table 3). Most comments were positive, the most common regarding the walking, the colobus monkeys, the forest and the quality of guiding. There were also many favourable comments about the monkeys in general, and about the waterfall.

Birds received fewer positive comments, and some visitors commented on not seeing many (or enough) birds. Only one comment praised the chimp viewing, whilst one expressed hope of seeing them another time. This reflects the difficulty of seeing chimps, despite the fact that chimp tracking is a popular (and promoted) activity. Interestingly, almost as many people made positive comments about the tea plantations as did about bird viewing, despite the fact that the former is not an overt focus of current activities.

Attraction	Number	%
Trails/walking	22	18.0
Colobus	20	16.4
Forest/scenery/flowers	20	16.4
Guides	19	15.6
Monkeys	15	12.3
Waterfall	13	10.7
Birds	6	4.9
Tea plantation	5	4.1
Chimps	1	0.8
Rain (!)	1	0.8
Total	122	100.0

Table 3. Count of positive visitor comments, Jan-03 - Feb-04 (Source: Gisakura visitor book).

This sample is restricted to primarily independent visitors at Gisakura who were asked to sign the visitor book, and one would expect them to be generally positive. Tour operators offered less favourable observations when considering what Nyungwe had to offer for their potential clients. The issues that they raised were as follows:

- The difficulty (and unpredictability) of seeing primates, especially chimpanzees.
- The lack of a wider variety of guaranteed products/attractions/activities.
- The limited distribution of trail networks.
- The level of difficulty and maintenance of some trails.
- The lack of sedentary options, such as lookout points.
- Difficulty of bird viewing, especially in the swamp where there is little access.

It is clear that most trails necessitate a moderate degree of physical fitness. However, it is also the case that some trails could benefit from additional development, in particular more steps on steep or slippery sections, and resting points after steep climbs or at potential lookout points.

Inventory of existing tourist accommodation

The only existing accommodation for tourists in or adjacent to Nyungwe is at Gisakura and Uwinka. Both sites were established, and are managed, by PCFN.

- The principal accommodation is at the ORTPN/PCFN headquarters at Gisakura (Fig 8.). There, the PCFN managed guesthouse (built to accommodate visiting researchers and project staff) accepts overnight visitors. Three houses, comprising eight bedrooms, can accommodate up to 13 tourists per night. The houses have shared bathrooms, water and power, although both water and power supplies may be interrupted periodically. The guesthouse also has a kitchen and dining room to supply meals, at set times and if ordered in advance.
- Additional accommodation is available at Uwinka. This comprises two bedrooms that can accommodate three people at a time. There is also space for camping at Uwinka. There is an outside water supply but no power. In addition, there is a small shop selling a few basic supplies, but overnight visitors to Uwinka are required to be self-sufficient with regard to catering.
- Two other campsites are listed, one on the red trail (Fig 9.) and the other on Mt. Bigugu, but these are remote and rarely used.



PCFN Signboard at Gisakura



Gisakura Guesthouse

Use of existing tourist accommodation

Data from July to December 2003 suggest that, in total, 58.4% of visitors stayed overnight (Table 4). The proportion increased from July to December, but bed occupancy rates at Gisakura and Uwinka remained relatively constant at 25%. This suggests that the increased visitation to Nyungwe in July and August does not translate into increased overnight stays. However, the number of visitors that camped at Uwinka was higher at that time. By far the majority of overnight visitors stay at the Gisakura guesthouse.

Month	Total visitors	O/night visitors	O/night (%)	Gisakura (%)	Uwinka (%)	Camping (%)
Jul-03	245	124	50.61	62.9	6.5	30.6
Aug-03	260	123	47.31	74.0	13.8	12.2
Sep-03	165	94	56.97	68.1	16.0	16.0
Oct-03	170	110	64.71	81.8	7.3	10.9
Nov-03	90	64	71.11	98.4	1.6	0.0
Dec-03	124	100	80.65	85.0	12.0	3.0
Total	1054	615	58.35	76.6	9.9	13.5

Table 4. Occupancy of overnight accommodation at Gisakura and Uwinka, Jul-Dec 2003 (Source: PCFN).

Assessment of existing tourist accommodation

The accommodation at Gisakura guesthouse is comfortable, and is set in a picturesque landscaped garden with remnant forest at its edges. It offers a relaxing environment with easy bird watching opportunities for those who desire it. It is surrounded by picturesque tea plantations, and is close to the waterfall trail and the easily viewed colobus troop in the remnant forest on the Gisakura tea estate, both of which are important perennial visitor attractions.

However, it suffers some limitations:

- First, the accommodation is relatively basic, with shared bathrooms.
- Second, the hot water supply is a trickle at best, and sometimes the water supply and power is interrupted for days at a time.
- Third, the kitchen is very basic. Whilst the staff is capable of providing a good quality menu, meals must be ordered in advance and a large group can result in long delays.
- Fourth, there is no communal area, other than the dining room, which is locked between meals. In particular there is no veranda or other facility from which to enjoy the surroundings.
- Fifth, there is no retail outlet or bar. Drinks may be purchased from the kitchen when it is open, and one or two books and postcards are for sale in the office, but otherwise there is no provision for visitors to purchase anything.
- Sixth, it is adjacent to the main road. Whilst a thick hedge and forest boundary absorbs much of the traffic noise and affords good privacy to the site, there is still some noise, and a potential security risk.
- Finally, whilst it is well located for attractions bordering the forest, it is a 25-minute drive from Uwinka where many of the coloured trails within the forest begin.

The Uwinka site is within the forest and at the head of many of the coloured trails. Thus it is more favourably located for those wishing to walk these trails, and especially those wishing to track chimpanzees, for which an early start is required. It has a rudimentary reception building (*rondavel*) within which are housed a range of maps, some basic exhibits (seeds and feathers labelled in French, some elephant skulls, a book stand), and the trail information sheets described above. It also has a larger range of retail items than Gisakura, including t-shirts,

hats, posters and maps. The site has picnic tables, and a second *rondavel* from which one can purchase soft drinks and beer.

However, the Uwinka site is very basic. The one guesthouse has no power or water supply; external washrooms have a cold-water tap. There is no dining room, restaurant or kitchen, so visitors must bring both food and means of cooking it. There is also no communication except by radio to Gisakura. As a result this site is little used.

In fairness, both sites were established initially as PCFN/ORTPN stations, and only secondarily as tourist centres. Thus they lack some of the finesse that a commercial operator might employ. Whilst facilities are generally acceptable to independent tourists travelling on a budget, they are not of the required standard for higher spending visitors. All of the national and international tour operators questioned cited a lack of adequate accommodation as a major obstacle to the inclusion of Nyungwe in their Rwandan itineraries.

Inventory and assessment of existing transport and communication infrastructure

There is currently no transport provision between Gisakura and Uwinka. However, this is not a major problem since the majority of visitors arrive with their own transport (personal, hired, or provided by their tour operator). The few visitors who arrive by public transport, should they wish to visit Uwinka or the trails within the forest, are dependent upon hitching a ride or taking a passing *matatu* (public minibus taxi) that run through the forest between Cyangugu and Gikongoro.

One problem that is created by the geographical separation of Gisakura and Uwinka is the provision and transport of tourist guides at and between these sites. Guides are needed at both sites, since trails begin at both sites, and in between. However, because the provision of guides and their competency levels are limited (see below), it is sometimes the case that the appropriate guide is not at the appropriate station when a visitor requires them. Thus, visitors have been known to have to travel between Gisakura and Uwinka simply to collect a guide.

Related to this is the problem of communication. Currently, bookings for accommodation are managed locally at Gisakura station, although assistance is provided to visitors through ORTPN in Kigali. Communication with Gisakura is limited to telephone access during office hours, which hinders efficient management and flow of information regarding bookings. As a result, some visitors appear to arrive without confirmed bookings, and others arrive to find that their booking has been recorded incorrectly, so that they end up with a twin rather than double room, or no room at all. This causes some frustration, for both visitors and staff.

A further point regarding communication is the flow and availability of information. Many visitors rely on guidebooks that are incorrect or out of date – an example being the requirement for an ORTPN guide on any trail, which some publications list as optional. Equally, many visitors arrive requesting information regarding local activities and attractions. Whilst the Gisakura office has photocopied sheets (in English and French) detailing the various trails, activities, accommodation and prices, it does not have any information booklets on the forest and its wildlife, or on potential attractions in the surrounding area. The geo-motion marketing website has assisted in the regard, and since its launch some visitors to Gisakura are already commenting favourably upon it. However, detailed and specific local information remains limited. As a result, some visitors arrive with misguided expectations regarding, for example, the ease of viewing chimpanzees or the level of difficulty of certain trails.

Inventory and assessment of human resources and capacity

ORTPN currently employs seven tourist guides that are based variously between Gisakura and Uwinka. All have recently undergone a test of their abilities by ORTPN, and only those reaching a certain standard have been retained. The two guides evaluated directly on guided

walks both spoke an acceptable level of English and offered a good standard of interpretation and visitor care. However, in general the following weaknesses are noted:

- Not all guides speak English, and so some English-speaking visitors do not receive an English-speaking guide.
- Not all guides are willing to offer interpretation during guided walks.
- Bird identification skills are weak.
- Some guides were noted to have been drinking alcohol prior to guiding visitors. This is noticed by visitors, and is completely unacceptable.

There are also a number of trackers who are charged with locating primates for visitors. They also serve to habituate primates by locating and following them regularly over the longer term. These individuals generally do not speak English (or even French in some cases), but this is less relevant since they are not the main point of contact for visitors. However, their effectiveness as trackers is hindered by their propensity to only start searching for primates once visitors have arrived on a trail. In the case of chimpanzees in particular, this will markedly reduce the likelihood of locating the animals.

The Gisakura guesthouse employs four principal staff; two cooks and two room staff. One of the latter speaks some English and acts as a waiter and general point of contact. The ORTPN receptionist also acts as a point of contact for visitors, and speaks English.

ANNEX 4. COMMUNITY CONSULTATION EXERCISES

Meeting with representatives from Cyangugu province, 12 February 2004, Nyamasheke

The following were present at the meeting:

NAMES	FUNCTION	SECTOR	DISTRICT
Dr MATT WALPOLE	Consultant		
Mr BIZIMUNGU François	Chief Warden/RNN		
Mr NICOLAS BLONDEL	Director/PCFN		
Mr MURINDAHABI Félix	Ass .Administrator PCFN		
Mr GAKWERERE Roger	Assistant Warden in charge of Tourism/RNN		
MANIRAKIZA Gervais	Coordinator	Gasumo	Bugarama
KANYABASHI Thomas	Coordinator	Bweyeye	Bugarama
NDIYIZI J. Damascène	Coordinator	Ngange	Gatare
SEBERA Modeste	Coordinator	Gahisi	Gatare
NGIRUMPATSE Daniel	Coordinator	Cyiya	Gatare
KAYIRANGA Eleuthère	Coordinator	Ruharambuga	Bukunzi
NDAYABONYE Damien	Agronome forestier		Gatare
GATERA Anthère	Cordinator	Mugomba	Gatare
KAYUMBA Fabien	Cordinator	Karambi	Gatare
UZARAMA Raymond	Cordinator	Bushekeri	Nyamasheke
MUNYANGEYO Théobard	Cordinator	Bunyereri	Bugarama
NTAWANGWANABOSE Sylvestre	Cordinator	Kanyinya	Bukunzi
BAKUNDUKIZE J.Damascène	Cordinator	Butare	Bugarama
GAHUTU Jean	Secretary	Mpabe	Nyamasheke
NKUNDABARAMA J.Claude	Vice-Mayor/ social affaires		Gatare
SIBOMANA Denis	Cordinator	Muraza	Gatare
TABARO Vincent	Cordinator	Rwumba	Gatare
NSHIMIYIMANA J. Claude	Secretary	Rangiro	Nyamasheke
NZABAMWITA Paul	Forestor	AREDI	Cyangugu
MUVUNYI Alex	Marketing technician	AREDI	Cyangugu
SIMBARIKURE Théogene	Mayor		Nyamasheke

Agenda For The Meeting

1. Personal introductions
2. Tourism and its potential in Nyungwe and Cyangugu Province
3. Rationale of the meeting
4. Items to discuss
 - a. Importance of Nyungwe to Districts and Province
 - b. Current activities and livelihoods
 - c. Environmental education and awareness
 - d. Perceptions of tourism
 - e. Opportunities for integrating tourism and community development; products and services
 - f. Constraints on integrating tourism and community development
 - g. Requirements for the integration of tourism and community development.
5. Final questions and close of the meeting

Minutes of the meeting (recorded by ORTPN/PCFN staff)

The meeting started at 10:00 am by Mayor of Nyamasheke District giving opening remarks followed by Chief Park Warden of Nyungwe Forest Reserve who gave the agenda of the meeting, introducing some of the visitors and asking the rest of participants to introduce themselves.

The Chief Park Warden explained the reason to prioritise the tourism:

- Tourism is one of the priorities of Rwandan Government
- National economic development through different tourism sectors including travel agencies, accommodation agencies, tour guide agencies, etc

He reminded the audience that tourism should not be conducted only in Protected Areas but there are other many tourist attractions outside of them such as museum, Lake Kivu, people and their culture. He also explained the reason of the consultant being in the meeting with Sector and District leaders is to discuss on how Tourism activities can be developed in Nyungwe Forest and in Cyangugu Province.

The consultant in his speech, talked about his observations on tourism in Nyungwe, its potential, opportunities and constraints.

Meeting with representatives from Gikongoro province, 13 February 2004, Gikongoro town

The following were present at the meeting:

NAMES	OCCUPATION	DISTRCT
NIYITEGEKA Marthe	Vice mayor in charge of gender	Nshili
BUTERA Dismas	Mayor	Mudasomwa
HABAMUNGU Alphonse	In charge of tourism in Gikongoro province	
RUREMESHA Alfred	Agronome	Mushubi
NSANZABAGANWA Epimaque	Environmental Division chief	
KAGERUKA Astarque	Director of development (DADI)	

Minutes of the meeting (recorded by ORTPN/PCFN staff)

The meeting started at 11:00 am by Director of development in Gikongoro province, Mr KAGERUKA Astarque, giving opening remarks followed by Chief Park Warden of Nyungwe Forest Reserve who gave the agenda of the meeting, introducing some of the visitors and asking the rest of participants to introduce themselves. In his introduction, the Chief Park Warden said that Tourism is one among other priorities of Rwandan Government to reduce poverty in Rwandan community. Previously, tourism was limited only to the national parks where animals can be visited but currently it is possible to develop tourism activities outside the protected areas.

The main objective of the consultant, said Chief Park Warden of Nyungwe Forest Reserve, is to develop Tourism Development Plan in Nyungwe and Provinces around Nyungwe Forest Reserve including Gikongoro Province. Hence, the ideas exchange and discussion in the meeting will give him more information on the opportunities and constraints in promoting tourism industry in Nyungwe and its surrounding provinces

The following two main points were discussed in this meeting:

- Opportunities of developing tourism activities in Gikongoro District, and
- The constraints to development of Tourism activities.

In his speech, the Consultant told the audience the potential of tourism in Nyungwe Forest Reserve, categories of tourists that visit Nyungwe, and constraints of tourism in Nyungwe. Potential of Tourism in Nyungwe.

On the audience side, the participants argued that tourism in Gikongoro is not well developed because of lack of tourism infrastructure and facilities e.g. roads to facilitate the accessibility to the tourist attractions with example of the cultural sites and caves in Karaba District. Among opportunities, the audience mentioned the following most important:

- Developed Project Association “*Projet de Developpement Artisanal au Sud du Rwanda*” (PASUR) supported by GTZ, it makes handcraft since 2003. This project, with a headquarters in Kigali, covers Gitarama, Butare and Gikongoro provinces and has curio shops at Butare, Gitarama and Gikongoro. It needs marketing and product development assistance so that they may know the quality and goods that may be looked for by tourists.
- Honey products: Gikongoro Multisector investment (MIG) is an association that will start the realisation of activities of beekeeping in March 2004 at Gikongoro Province. A further thirteen beekeeping associations supported by Rwandan Integrated Development Association (ARDI) are found in different Districts (Mushubi, Mudasmwa and Nshili) of Gikongoro Province.
- Natural and artificial attractions and tourism sites in Gikongoro.

Attractions	Sector	District
Nile Source		Mushubi
Salt water/ source	Kibyagira	Mudasomwa
Under ground water /Water fall	Bugarama - Kibirizi	Mudasomwa
Cultural site in Mwogo river (Nil source)	Muganza	Karaba
Under ground water	Runyombyi	Nshili
Water fall	Gisanze	Nshili
Hot spring	Rutiti	Nshili
Water fall on Rukarara River (River Nile Source)		Mushubi

Artificial sites

Attractions	Sector	District
Coffee factory		Karaba
Tea factories/plantations	Kitabi	Mudasomwa, Nyaruguru, Nshili
Kibehe saint Mary site	Kibehe	Nyaruguru
Genocide memory	Murambi	Gikongoro town

The meeting was closed at 2:00 P M by the word of thanks by the Director of development in Gikongoro.

Meeting with national and international stakeholder representatives, 20 February 2004, Novotel, Kigali

The following were present at the meeting:

NAME	ORGANISATION	ADDRESS
Fidele RUZIGANDEKWE	ORTPN	
Emmanuel WERABE	ORTPN	
Rogers KAYIHUA	ORTPN	
Chris RENZAHO	Dancing Pots	
Joan MIZIMHAKA	OTF	
Francois BIZIMUNGU	ORTPN	
Glenn BUSH	Independent Consultant	
Jane SEBUJISHO	ORTPN	
Ronald RUTEHENDA	Volcanoes Safaris	
Etienne NGOBOKA	Volcanoes Safaris	
Isaac BAZIMAZIKI	GTZ/PASUD	
Praveen MOMAN	Volcanoes Safaris	
Bill WEBER	WCS	
Michel MASOZERA	WCS	
Nicolas BLONDEL	WCS	
Louis GATEBUKE	MINICOM	
Telesphore NGOGA	ORTPN	
Roger GAKWERERE	ORTPN	
Malik FAL	OTF	
Matt HODGES	Geomotion	
John KAYIHURA	Primate Safaris	
Charlotte MUKAKIGERI	Novotel Kigali	
Monique CALON	Dutch Embassy	

List of participants (incomplete)

After a powerpoint presentation by the consultant, the following discussion was held:

- **Nicolas Blondel (PCFN)**

(1) A remark: It is necessary to stress that as mentioned in the presentation, the Gisakura Guest House run by the project is a transition situation and it is not the role of the project to run a hotel and restaurant. In a way, the project “does not wish” to upgrade the guest house and it can be argued that if the project guest house started providing high quality accommodation it would delay private involvement of the private sector in tourism activities in Nyungwe.

(2) Aspect nr 1 to add to the tourism development plan (or to mention): the importance of applied research to develop eco-tourism activities. This with particular reference to the control of the primate habituation and offer of guaranteed primate viewing (+ add emphasis on colobus, not only chimps).

(3) Aspect nr 2 to add to the tourism development plan (or to mention): the importance of anti-poaching and law enforcement. First the level of illegal activities is still too high compared to the requirements of a prosperous tourism industry in Nyungwe. Two days ago a poacher has seriously wounded a ranger with a machete right in a sector where tourists are brought on a regular basis. Secondly, there is currently an over-emphasis on the “pure development of tourism” and an under-emphasis on the reinforcement of the protection of the forest, while the latter is necessary to achieve the former. Example: the status of rangers is excessively downgraded compared to the status of guides, etc.

- **Bill Weber (WCS)**

There were 3000 tourists visiting Nyungwe per year in 1990, most of them through tour operators. Then it was stopped by the events and insecurity. But now that security has improved, these tourists do not seem to have come back: why?

Consultant's reply: tour operators mention the following key points: lack of accommodation facilities, perceived insecurity, lack of information on Nyungwe. The increased media coverage on Nyungwe in Europe may change this situation in the future.

- **A private sector (?) participant**

The immediate direct interests of the population around the forest have to be addressed. Indeed, it is said that handicraft production has to be developed, but the craftsmen do need to enter the forest to get their raw material. Therefore, why not make the area of the buffer zone plantations available for them.

Consultant and other's reply: production of honey should be developed; it is envisaged to plant bamboos outside the forest.

Michel Masozera's reply: the buffer zone has been managed by the Ministry of Agriculture but now there is the decentralization process. This aspect is currently being studied, how that buffer zone could be managed and benefit local users.

- **Malik Fal (OTF)**

Series of comments: clarification on Kitabi as a short-term solution. Tour operators would prefer sites inside the forest near rich areas of the forest. The boat tours on Lake Kivu have been discussed for 2 years now, but nothing has been done in fact. A critical aspect is that there is a need to link research and visitors. Indeed, a lot of the potential visitors in Nyungwe are people passionate about nature. Facilitate contacts between research staff and visitors would be great. Lastly, the idea of combining hard activities (trekking and tracking) and easy / relaxing activities is great.

Bill Weber's answer: The park guides are Rwanda's ambassadors and their training is essential. Visitors see the guides and not the ministers or directors.

- **John Kayihura (Primate Safaris)**

The guides of Nyungwe are very bad. When visitors ask questions on the species and ecology of the place, the guides do not have a clue.

- **Malik Fal (OTF)**

People should not rush to visit Nyungwe. To visit such a place, you need peace; you need to move quietly and slowly. It is important to avoid "tour bus mentality" in this case.

- **Emmanuel Werabe (ORTPN)**

He stresses the good work of the consultant. He explains that ORTPN has planned to have qualified guides (graduates, bilingual, + organize training). If the Nyungwe guides have poor skills it can be explained by the fact that Nyungwe has had few visitors until now, but it will change.

- **François Bizimungu (ORTPN)**

First concern, the development of the source of the Nile has been ranked as an activity for the long term, while in fact things are already being done to open it as an attraction, and it already existed before the war as a destination. So it should be included among the priority actions. Second concern, if we want to develop chimp habituation and visits in Cyamudongo, is it a

viable activity / is the chimp population there (1 group of about 20 individuals) going to disappear?

Consultant's reply: The source of the Nile presents one difficulty, it is not accessible and tourists do not have enough time. And it is questionable whether tourists will be enthusiastic to just see a small spring or water trickle. It does not seem to be a priority for marketing Nyungwe. But there will be a market for trekking in Nyungwe, so that it could become an attraction sooner than in the long term, but it is still not a priority.

Bill Weber's answer: yes, there is a risk of chimp extinction in Cyamudongo, but we see that most "operational" chimp viewing sites in Africa are small isolated sites. And technically, reintroduction of chimp individuals is possible, especially females. Only if the resident group was wiped out and a totally new group of "captive" chimps had to be reintroduced to Cyamudongo could it lead to problems: the new chimps would be likely to cause a crop raid problem.

- **Consultant**

The issue of the measures to guarantee the actual implementation of the plan has to be raised, so that the plan does not stagnate or end up in a drawer.

ANNEX 5. REFERENCES

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